VISUAL

BUSINESS TOOLS

PERSONNEL DIRECTOR

USER'S GUIDE

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1 Introducing Personnel Director

Welcome

Welcome to Personnel Director, the latest 32-bit client-server HR system from Vizual Business Tools plc, part of OneClickHR plc.

The programming team here at Vizual Business Tools plc has worked hard to create a product that can help you to collect, collate, and report on employee data, quickly and easily. Our aim has been to develop a system that is easy to use and offers more functionality per £ than any other personnel software on the market.

You can use Personnel Director to quickly and efficiently gather personnel data and, where possible, reduce the administrative burden of keeping personnel records. Key dates can be logged automatically so they don't slip by unnoticed, and detailed analysis of the stored data can be carried out at the click of the mouse, effortlessly producing comprehensive management reports. Whether you have upgraded from our other products or are using a Vizual product for the first time, we hope that Personnel Director will make your life easier.

Thank you for selecting Vizual as your HR system supplier.

How This Guide is Organised

This *User's Guide* is organised as follows.

Chapters 2 to 4 provides you with the information you need to install and set up Personnel Director in your organisation. This includes instructions on how to set up multiple user accounts, create templates for adding new users, and specify the privileges that users have to access databases, fields, screens, functions, modules, and the records of other employees.

Chapters 5 to 9 cover the basics of Personnel Director, including: opening and closing databases, working with key employee detail records, recording and tracking holiday and absence, and working with other types of employee data, such as career and medical history, training and education, and payroll and bank details.

Chapter 10 contains the information you require to track employee hours in compliance with the Working Time Regulations.

Chapters 11 to 15 cover creating and using diary reminders, working with groups and filters, using the Report List to organise your documents, printing mail merge letters, and creating and printing graphs.

Chapters 16 and 17 contain information you can use to further exploit Personnel Director's capabilities. Use the instructions to create database queries, employ Personnel Director's advanced reporting techniques and lay out and format reports in the Page Designer.

Chapter 18 explains how to update records using the batch input and global update functions.

Chapter 19 is dedicated to the maintenance of your Personnel Director databases. Here is where you find instructions on maintaining lists of databases and servers, populating pick lists, refreshing calculations, and, when necessary, importing data from other sources, as well as database backup, restore, verification and repair and shutdown and restart operations.

Chapter 20 explains how to install and configure the Payroll Link and specify what information is shared between Personnel Director and the payroll program, Payroll Director. By linking to this payroll program, you eliminate re-keying of information in the payroll and Personnel Director programs.

Chapter 21 explains how to install and configure Working Time Tracker and specify what information is shared between Personnel Director and the tracking program. By linking to Working Time Tracker, you eliminate re-keying of information in the tracking and Personnel Director programs.

Chapter 22 explains how to install and configure the Report Scheduler so that you can generate Personnel Director reports on a scheduled basis and email them to the selected recipients.

Chapter 23 contains information about the Screen Designer. Use this advanced application to customise Personnel Director's screens and screen prints to meet your organisation's requirements. You can even create new screens and their associated screen prints. Screen Designer is also the tool you use to change the Employee Record Card.

This manual also includes details of the Service and Support you can obtain for Personnel Director and two appendices that contain information about pay period calculations and how to use operators and functions.

About Vizual Business Tools

Vizual Business Tools was set up in 1996, and shipped its first product, Visual Personnel, to customers in June 1997. The business was established to fill the market need for a powerful, yet cost effective off-the-shelf HR system.

Within 18 months of its launch, Visual Personnel had become the best-selling HR software in the UK, with over 5000 users in 3500 companies. The Dutch version of the product was launched in March 1998 and by January 1999, the UK version had been shipped to customers in over 26 countries worldwide.

Other products in the Vizual range include:

Employee Self Service Module – the add-on for Personnel Director that gives users access to employee data from a web-based interface.

Payroll Director — easy to use customisable enterprise-level payroll software.

CaptureIT/Working Tiime Tracker — the PC and hardware-based time recording system.

Recruitment Director — A professional, flexible, fully customisable enterprise-level recruitment management system.

Training Administrator – the essential tool for effective training administration management.

HRCHARTER – a simple-to-use graphical tool for charting management structures, lines of reporting and hierarchy. Available to link with both Personnel Manager and Personnel Director.

KWIKID – the complete out-of-the-box ID card solution.

Fleet Manager — the fleet management software solution.

Personnel Manager — the 32-bit HR system for single or multiple users.

Screen Designer — an add-on tool for customising screens within Personnel Manager to the user's exact requirements. (This add-on is included in Personnel Director for customising Personnel Director screens.)

Asset Tracker — the tool for managing corporate assets.

Accident Tracker — an electronic accident book.

Risk Assessor — the ideal solution for assessing risk in the workplace.

COSHH Manager — the best solution for effective COSHH regulation enforcement.

Payroll Manager — the 32 bit payroll system with links to Personnel Manager.

Recruitment Manager — ideal for managing staff recruitment and selection.

How Personnel Director Works

Personnel Director is a multi-platform client-server HR system. Users can store over 600 separate pieces of data, with unlimited history in each category, on each employee, including:

- Key Personal Details
- Attached Documents
- Correspondence History
- Career History
- Disciplinary & Grievance Records
- Bank Details
- Benefit History
- Company Vehicle Details and Use
- Education History
- Emergency Contacts
- Employment History
- Employee Appraisals

- Exit Interview
- Holiday and Absence
- Key Dates
- Maternity Details
- Medical History
- Professional Memberships
- Pay History
- Skills Records
- Terms and Conditions of Employment
- Training History

Users can modify any of the existing screens using the Screen Designer and create additional screens for each employee.

Personnel Director comes with a various standard employment letter and contract templates which can be printed for any number of employees using the built-in word processor or by linking to Microsoft Word. The standard templates cover:

- Recruitment
- Letters of appointment
- Contracts
- Maternity leave
- Disciplinary
- Grievance
- Warnings
- Dismissals

You can track employee data in the built-in spreadsheet or use the “single button” export to Microsoft Excel.

Users can track important employee dates in the built-in diary or use Microsoft Outlook. Diary events can be automatically triggered from most fields in the system.

Personnel Director comes with its own Report Builder tool, allowing users to easily analyse data stored on the system. The software comes with a wealth of standard reports that can be modified, and users can add unlimited new reports and graphs. Reports can be generated in text format or as graphs which can easily be copied into other Windows applications.

Supported users of Personnel Director can also access the Employers' Guide to HR at www.vizual.co.uk/employers-guide.asp – an online guide to good personnel management practice. This feature is particularly useful if you have not had formal personnel management training and require clarification on what course of action to take when managing employees.

Note: *To use Microsoft Word, Excel, or Outlook, ensure that the application (97 or above) is properly installed on your computer.*

Backing Up Your Data

It is extremely important that you regularly make backups of your Personnel Director databases. Back up Personnel Director databases using your own scheduled backup software. For more information, see "Backing Up and Restoring a Database" on page 461.

2 INSTALLING PERSONNEL DIRECTOR

This chapter contains installation and startup instructions for InterBase and the Personnel Director. InterBase is a Relational Database Management System (RDMS) used by Personnel Director to store and manipulate employee information. This chapter also includes instructions about upgrading from Personnel Manager to Personnel Director.

Note: *See the next chapter for instructions on creating user accounts and templates and setting security privileges.*

System Requirements

Use the following table to ensure that you have the required hardware and software for the server, workstations and network where Personnel Director is to be run.

Client	The Personnel Director Client runs on an IBM compatible PC running one of the following operating systems: • Microsoft Windows 95, 98, ME or Microsoft Windows NT4 Workstation (Service Pack 5 and above) Minimum Specification: Intel Pentium (or compatible), 233MHz (or higher) 64MB RAM, CD-ROM or DVD-ROM drive. • Microsoft Windows 2000 or Microsoft XP Minimum Specification: Intel Pentium II (or compatible) 300MHz (or higher), 128MB RAM, CD-ROM or DVD-ROM drive. Note: While you can run Personnel Director on lower specification systems, there could be a performance loss when using large databases.
Server	The Personnel Director Server is based on InterBase 5.6, and will run on one of the following network operating systems: • Microsoft Windows 95, 98, ME or Microsoft Windows NT4 Workstation (Service Pack 5 and above) • Microsoft Windows 2000 or Microsoft XP • Red Hat Linux 5.1 • Novell Netware 4.2 /5 • SCO Open Server 5.0 • Solaris 2.5.x /2.6 • Hewlett Packard • HP-UX 10.20 • IBM Power PC AIX 4.1.2/ 4.1.3 Minimum recommended hardware is: Intel Pentium II (or compatible) 300MHz (or higher), 128MB RAM.

Network Protocols	Network protocols should be MS-NET compatible for Multi-user versions. For example, TCP\IP, IPX\SPX. Note: If the network protocol is NETBUI or NETBIOS, *do not* set up the server on Windows 95 or 98 due to compatibility issues
OLE Links	Personnel Director comes complete with custom Word Processor, Spreadsheet and Diary programs. Personnel Director also links dynamically with the following applications: • Word processor: MS-Word 97 and above. • Spreadsheet: MS Excel 97 and above • Diary: MS Outlook 97 and above
Application Disk Storage	Personnel Director requires 40Mb hard drive space for installation on client systems.The InterBase Server requires a minimum of 10Mb for the application.
Data Disk Storage	It is recommended that at least 20MB of hard drive space is available to store databases on the server. A database containing 10,000 records with one sub record per employee, uses approximately 10MB of disk space This increases if all available fields are populated, large notes fields are used, multiple sub records are created, or if any files are attached to the database. If images or other files are attached to a Personnel Director database, then additional storage space will be required for these files.

Part 1: Installing Personnel Director on the Network Server

To install the server component of Personnel Director, you must complete the following steps on the network server:

Step 1: Install the InterBase Server

Step 2: Add additional InterBase licences and restart InterBase services

Step 3: Install Personnel Director Global, Demo and Archive databases

Step 4: Change the InterBase Server administrator password

Notes:

1. *Before installing Personnel Director, make sure that you have the necessary administrator rights and permissions to perform the installation.*
2. *Ensure that Regional Options are set to English(United Kingdom). (Select Start>Settings>Control Panel>Regional options General tab).*
3. *Note the name or IP address of the server.*

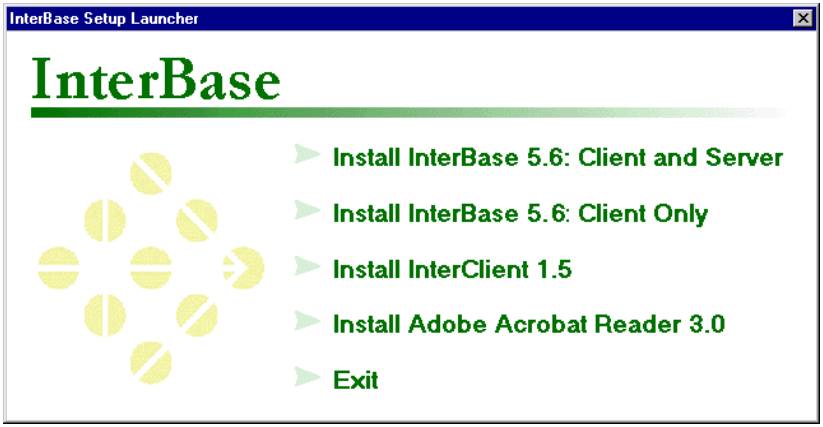
Step 1: Installing the InterBase Server

1. Place the InterBase CD-ROM into the CD-ROM drive of the server where you want to install Personnel Director.

   The Setup program should start automatically. If it does not, follow these instructions to start the Setup program.

   - Click the Start button on the Taskbar.
   - Select Run from the popup menu.
   - Type **x:\setup.exe** where X is the drive letter of your CD-ROM drive, then click the OK button.

   The main InterBase screen appears.



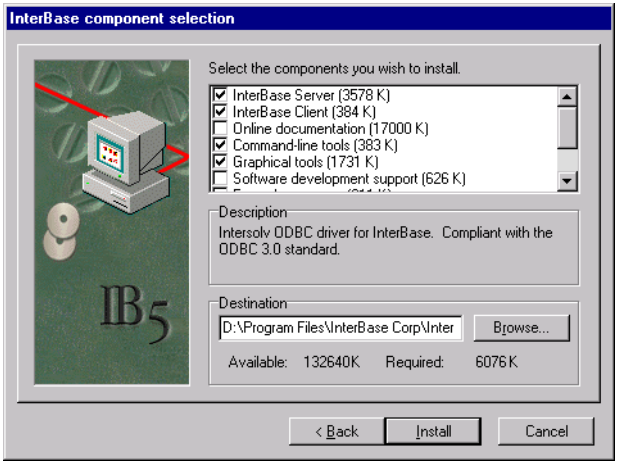
2. Select the Install InterBase 5.6: Client And Server option.
3. Click Next until the Software Activation Certificate screen appears.

Provide the following information found in your InterBase licence agreement.

Certificate ID. Type the certificate identification number.

Certificate Key. Type the certificate key.

4. Click Next until the Component Selection screen appears.



- If space is a consideration, the following components are optional:

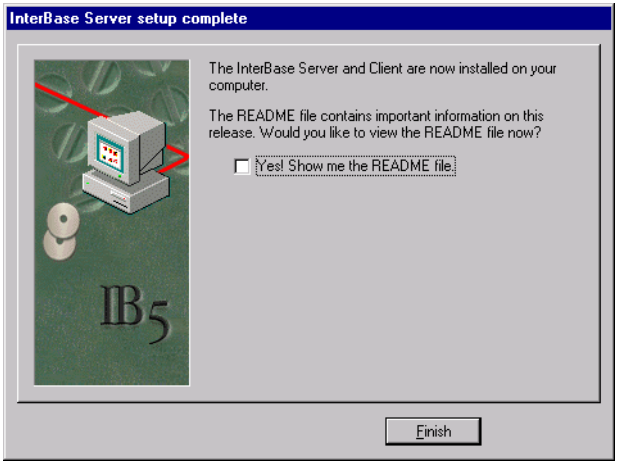
  Online Documentation
  Software Development Support
  Example Programs
  Example Databases
  ODBC Driver

  Clear the checkboxes of those components you do not want and click OK.

- To change the destination, click the Browse button to select the desired folder.

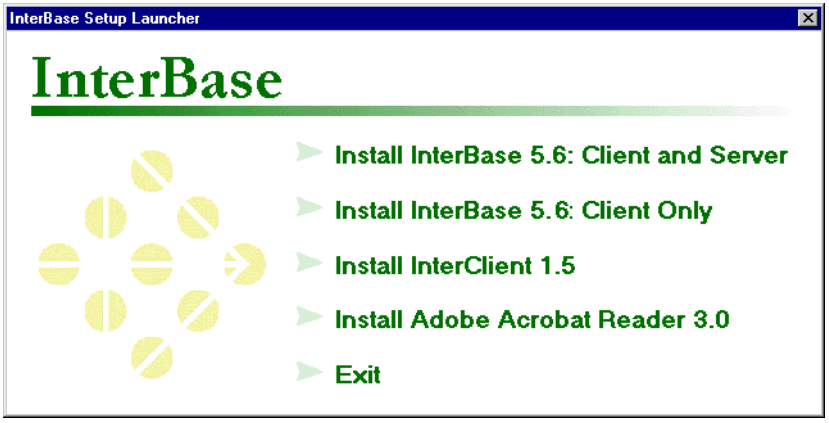
5. Click the Install button to install the components.

When the files are copied, the InterBase Server Setup Complete screen appears.


InterBase Server setup complete
The InterBase Server and Client are now installed on your computer.
The README file contains important information on this release. Would you like to view the README file now?
Yes! Show me the README file.
IB5
Finish

6. Click Finish.

   The main InterBase window reappears.



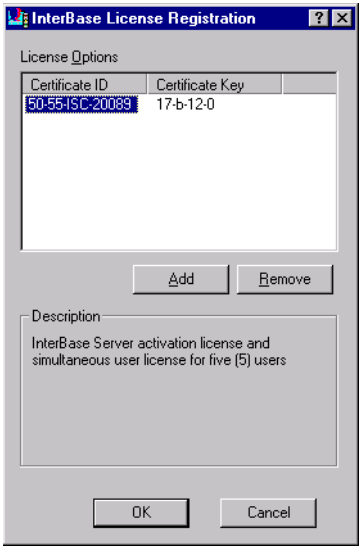
7. Click Exit.

Step 2: Installing Additional Database Licences and Restarting InterBase Services

Locate the licence card in the box with the Personnel Director software. On it, you will find the appropriate licence keys for the version of Personnel Director that you purchased (5, 10 or 20 simultaneous users). Additional licences can be purchased from Vizual Business Tools.

1. From the Start button, select Programs>InterBase>Licence Manager.

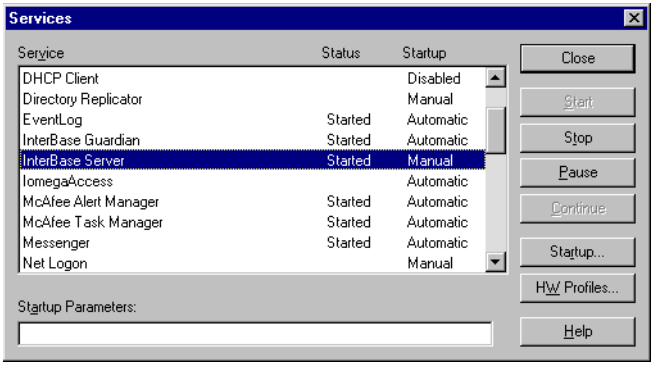
   The InterBase License Registration screen appears.



2. Add or remove licence information.
   - To add a licence, click the Add button, type the Certificate ID and Certificate Key provided by the licence, and click OK.
   - To remove a licence, select the Certificate ID and click Remove.
3. Click OK.

   The licencing information is updated.
4. From the Start button, select Settings>Control Panel>Services.

The Services screen appears.



5. Stop the InterBase server. Select the InterBase Server and click the Stop.
6. Restart the InterBase Guardian. Select InterBase Guardian and click Start.
7. Exit Services. Click the Close button.

Step 3: Installing the Personnel Director Global, Demo and Archive Databases

In this step, you restore the Personnel Director Global, Demo and Archive databases from the Personnel Director CD-ROM onto the network server. Be sure that you restore these databases to a directory on the network server computer and note the location of the databases.

***Important Note**: Personnel Director clients do not and should not have access to the Personnel Director directory on the network server where the database files are stored. Access to the databases is controlled by the InterBase server program. The user does not need an account on the network server computer, although they must be able to see the server in their Network Neighborhood and must be able to Ping it.*

1. Using Explorer, create a folder to contain the Personnel Director databases; for example, C:\PD
2. Place the Personnel Director CD-ROM into the CD-ROM drive of the server where you want to install Personnel Director databases.

   ***Note**: If the Setup program starts automatically, cancel it.*
3. From the Programs menu, select InterBase>Server Manager.
4. In Server Manager, select File>Server Login.

The Login screen appears.

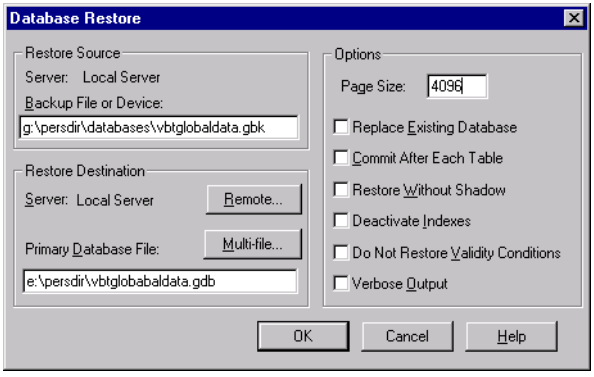
Provide the following information in the Server Info section:

User Name. Type **SYSDBA**.

Password. Type **masterkey**. The password is case sensitive; it must be typed in small letters.

5. To log into the IB server, click OK.
6. From the Tasks menu, select Restore.

   The Database Restore screen appears.



Backup File or Device. Type **d:\Databases\VBTGlobaldata.gbk**. If the Personnel Director CD is not in the D driver, type the correct drive letter.

Primary Database File. Type **c:\PD\VBTGlobalData.gdb**. If the folder you created for the Personnel Director databases in step 1 is not PD, type the correct folder name.

Page Size. Type **4096**.

7. To create the Global database, click OK.
8. When the restoration process is finished, close the Information screen.
9. Restore the Archive database. Follow steps 6 to 8 substituting the following information on the database file locations for the Archive database.

   Backup File or Device. Type **d:\Databases\Archive.gbk**. If the Personnel Director CD is not in the D driver, type the correct drive letter.

   Primary Database File. Type **c:\PD\Archive.gdb**. If the folder you created for the Personnel Director databases in step 1 is not PD, type the correct folder name.

   Page Size. Type **4096**.

10. You can optionally restore the Demo database. Follow steps 6 to 8 substituting the following information on the database file locations for the Demo database.

    Backup File or Device. Type **d:\Databases\demodata.gbk**. If the Personnel Director CD is not in the D driver, type the correct drive letter.

    Primary Database File. Type **c:\PD\demodata.gdb**. If the folder you created for the Personnel Director databases in step 1 is not PD, type the correct folder name.

    Page Size. Type **4096**.

11. When the restoration process is finished, close the Information screen.

    The NT server is now ready for Personnel Director.

Step 4: Changing the InterBase Server Password

We strongly recommend that you change the system administration password to the InterBase server. To do this, start the InterBase Server Manager; consult your InterBase manual or online help for instructions.

Once you have changed the system administrator password in InterBase, you will need to run the program ChangePassword.exe on all PCs which use Personnel Director. For details please refer to "Changing the SYSDBA Password for Personnel Director Workstations" on page 29.

Note the name or IP address of the server:

Part 2: Installing Personnel Director on a Workstation

To install the Personnel Director on a client workstation, you must install the Personnel Director client software, the InterBase database drivers and, optionally, the InterBase Client Tools (with these tools, you can administer InterBase databases remotely for backup, restore and repair). When this is complete, from one of these workstations, you can configure Personnel Director database for all workstations.

Step 1: Install the InterBase Client Tools (all workstations)

Step 2: Check communications with the server

Step 3: Install the Personnel Director software (all workstations)

Step 4: Configure Personnel Director databases (one workstation)

Note: *Before installing Personnel Director on a Windows or NT network, make sure that you have the necessary administrator rights and permissions to perform the installation.*

Step 1: Installing the InterBase Client Tools on a Workstation

1. Place the InterBase CD-ROM into the CD-ROM drive of the workstation where you want to install Personnel Director.

   The Setup program should start automatically. If it does not, follow these instructions to start the Setup program.

   - Click the Start button on the Taskbar.
   - Select Run from the popup menu.
   - Type **x:\setup.exe** where X is the drive letter of your CD-ROM drive, then click the OK button.

2. Select the Install InterBase 5.6 Client Only option.
3. Click Next until the Component Selection screen appears.
4. Click Next until the Component Selection screen appears.
   - To accept the default component selection, click OK.
   - If space is a consideration, the following components are optional:

     Online Documentation
     Software Development Support
     Example Programs
     ODBC Driver

     Clear the checkboxes of those you do not want and click OK.

5. Click the Install button to install the components.

   When the files are copied, the InterBase Client Setup Complete screen appears.

6. Click Finish.

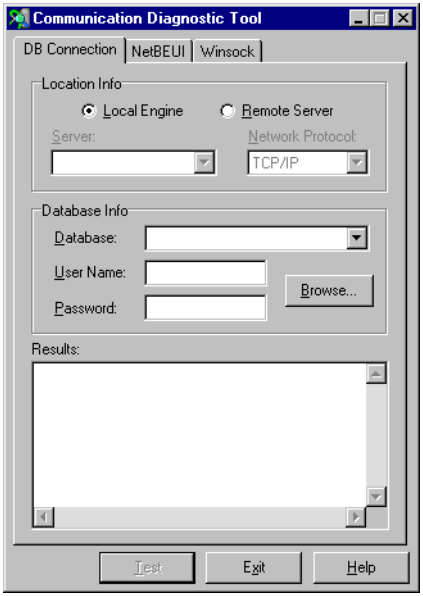
   The main InterBase window reappears.

7. Click Exit.

Step 2: Check Communications with the Server

1. From the Start button, select Programs>InterBase>Communication Diagnostics.

   The Communications Diagnostic Tool screen appears.



2. Click the Remote Server option.

3. Provide the following information.

   Server: Type the name of the server where the Personnel Director databases are located.

   Network Protocol: Select the network protocol from the drop-down list; for example, TCP/IP.

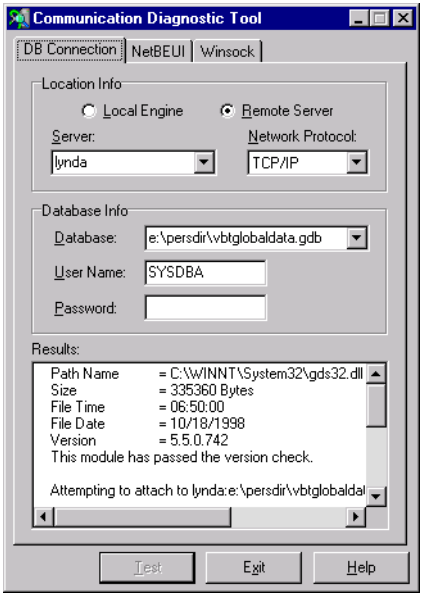
   Database: Type the path of the Personnel Database with which communication is to be tested; for example, C:\PD\GlobalData.gdb. The path you enter here is the path to the database as the server sees it, not as the client workstation sees it (as a shared drive).

   User Name. Type **SYSDBA**.

   Password. Type **masterkey** or the password currently assigned to SYSDBA. The password is case sensitive; it must be typed in small letters.

4. Click the Test button.

   The diagnostics program test the communication and reports the results.



If there is a problem:

- Check the spelling of the server, path and file are correct.
- Check that the syntax is correct for the network protocol you are using.
- Use the connection testing commands to test for network communication problems; for example, on TCP/IP use the DOS command PING to test the network connection.

5. When you are finished, click Exit.

Step 3: Installing the Personnel Director Software on a Workstation

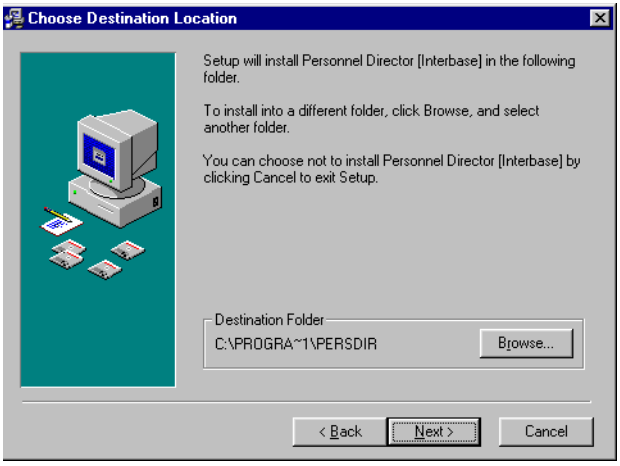
1. Place the Personnel Director CD-ROM into the CD-ROM drive of the workstation where you want to install Personnel Director.

   The Setup program should start automatically. If it does not, follow these instructions to start the Setup program.

   - Click the Start button on the Taskbar.
   - Select Run from the popup menu.
   - Type **x:\setup.exe** where X is the drive letter of your CD-ROM drive, then click the OK button.

2. Click Next.

   The Choose Destination Location screen appears.

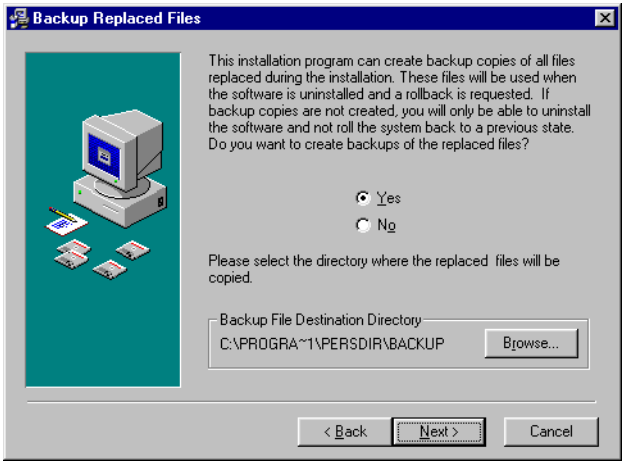

Choose Destination Location
Setup will install Personnel Director [Interbase] in the following folder.
To install into a different folder, click Browse, and select another folder.
You can choose not to install Personnel Director [Interbase] by clicking Cancel to exit Setup.
Destination Folder
C:\PROGRA~1\PERSDIR
Browse...
< Back
Next >
Cancel

It is recommended that you accept the suggested location, which is: C:\Program Files\PersDir. To specify a different location, click the Browse button.

3. Click Next.

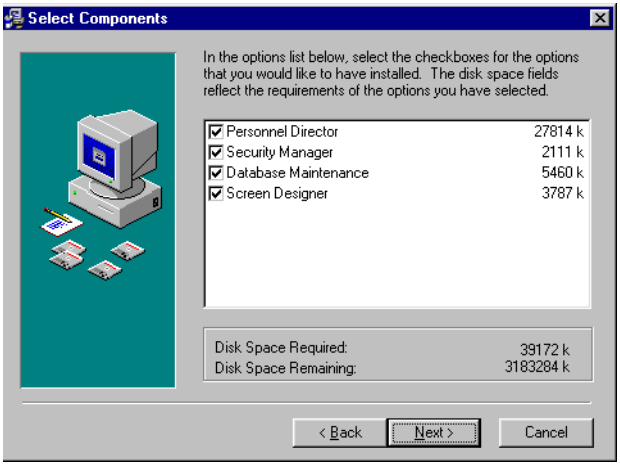
   Next, you are asked if you want to make a copy of your previous files so that you can return to the previously installed version if required.

   Select Yes to make a backup, then use the Browse button to specify a drive and directory for the backup files, or No to continue without backing up the older version files.


Backup Replaced Files
This installation program can create backup copies of all files replaced during the installation. These files will be used when the software is uninstalled and a rollback is requested. If backup copies are not created, you will only be able to uninstall the software and not roll the system back to a previous state. Do you want to create backups of the replaced files?
Yes
No
Please select the directory where the replaced files will be copied.
Backup File Destination Directory
C:\PROGRA~1\PERSDIR\BACKUP
Browse...
< Back
Next >
Cancel

4. Click Next.

The Select Components screen appears.


Select Components
In the options list below, select the checkboxes for the options that you would like to have installed. The disk space fields reflect the requirements of the options you have selected.
Personnel Director 27814 k
Security Manager 2111 k
Database Maintenance 5460 k
Screen Designer 3787 k
Disk Space Required: 39172 k
Disk Space Remaining: 3183284 k
< Back
Next >
Cancel

Personnel Director: Click this checkbox to install the Personnel Director program.

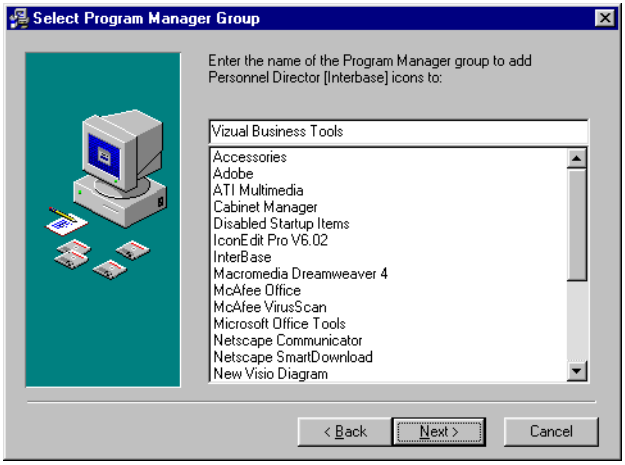
Security Manager: Click this checkbox to install Security Manager – an application you can use to set up multiple user accounts and specify users' privileges for accessing databases, fields, screens, functions, modules, and the records of other employees. This program is typically used by the Administrator.

Database Maintenance: Click this checkbox to install Database Maintenance – a wizard to create new and maintain a list of current Personnel Director databases. You can also use the wizard to import data from other sources, refresh Personnel Director calculations, and purge data. This program is typically used by the Administrator.

Screen Designer: Click this checkbox to install Screen Designer – a program you can use to customize or create Personnel Director screens and screen prints. This program is typically used by the Administrator or a programmer.

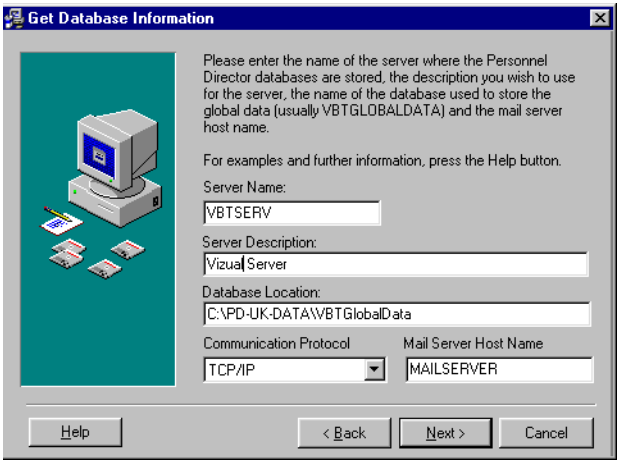
5. Click the Next button to continue.

Next, you are asked the name of the Personnel Director group you wish to create; accept the default Personnel Director, or select another group.



6. Click Next.

   The Get Database Information dialog appears.


Get Database Information
Please enter the name of the server where the Personnel Director databases are stored, the description you wish to use for the server, the name of the database used to store the global data (usually VBTGLOBALDATA) and the mail server host name.
For examples and further information, press the Help button.
Server Name:
VBTSERV
Server Description:
Vizual Server
Database Location:
C:\PD-UK-DATA\VBTGlobalData
Communication Protocol
TCP/IP
Mail Server Host Name
MAILSERVER
Help
< Back
Next >
Cancel

Provide the following information:

Server Name. Type the name of the server where the Personnel Director database is installed; for example, VBTSERV.

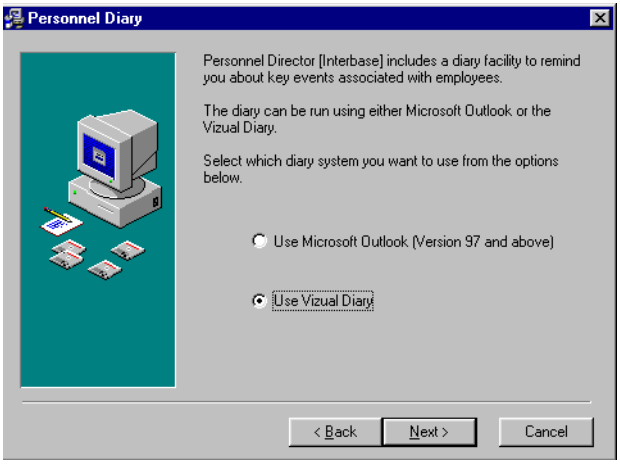
Server Description. Type a description for the server where the Personnel Director database is installed; for example, Vizual Server.

Database Location. Type the name of the folder you created on the server when you installed the Personnel Director databases; for example c:\PD.

Communication Protocol. Select the communication protocol used on your network. If you are installing the Personnel Director software on the same computer as you installed the InterBase Server, set the protocol to Local InterBase.

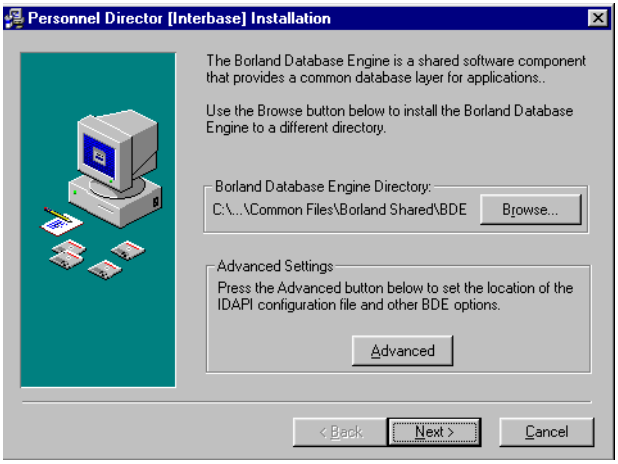
Mail Server Host Name. Type the name of the computer that is serving as the mail server; for example, MAILSERVER.

7. Clck Next.


Personnel Diary
Personnel Director [Interbase] includes a diary facility to remind you about key events associated with employees.
The diary can be run using either Microsoft Outlook or the Vizual Diary.
Select which diary system you want to use from the options below.
Use Microsoft Outlook (Version 97 and above)
Use Vizual Diary
< Back
Next >
Cancel

Indicate whether the user is to use Microsoft Outlook or the Vizual Diary (Personnel Director's built-in diary).

8. Click Next. Follow the instructions on the screen.

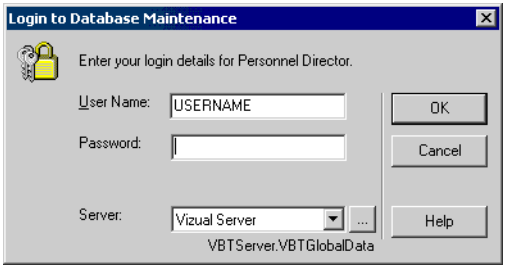

Personnel Director [Interbase] Installation
The Borland Database Engine is a shared software component that provides a common database layer for applications..
Use the Browse button below to install the Borland Database Engine to a different directory.
Borland Database Engine Directory:
C:\...\Common Files\Borland Shared\BDE
Browse...
Advanced Settings
Press the Advanced button below to set the location of the IDAPI configuration file and other BDE options.
Advanced
< Back
Next >
Cancel

The installation program continues automatically. When the installation is complete, a message appears indicating successful installation. A new Start menu group is created for Vizual Business Tools as well as a desktop shortcut for each module.

Step 4: Configuring Personnel Director at a Workstation

1. From the Start button, select Programs>Personnel Director>Database Maintenance.

   The Database Maintenance Login screen appears.



2. Provide the following login information:

   User Name. Type **USERNAME** as the User Name.

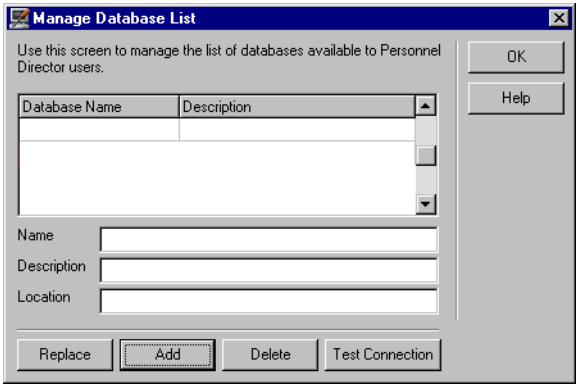
   Password. Type **password** as the password.

Server. Select the server running the Personnel Director database that you want to maintain. The path to the Personnel Director files is displayed below.

***Note**: Click the button to the right of the drop-down list button to maintain the list of servers.*

3. From the File menu, select Manage Database List.

   The Manage Database List screen appears.



4. Provide the following information for the demonstration database:

   Name. Type: **Demodata**.

   Description. Type: **Demonstration Data**.

   Location. Type the server and folder location of the Personnel Director Demo database on the server; for example, VBTServer:c:\PD\Demodata.gdb.

   This Database Is The Archive Database. Clear this checkbox. (This is not an Archive database).

5. Click the Add button.

   The Demo database will now be available whenever the user displays the list of Personnel Director databases.

6. If you want to create an Archive database continue with step 7; otherwise click the OK button.

7. Provide the following information:

   Name. Type: **Archive**.

   Description. Type: **Archive Data**.

Location. Type the server and folder location of the Personnel Director Demo database on the server; for example, VBTServer:c:\PD\Archive.gdb.

This Database Is The Archive Database. Click this checkbox to designate that this database is an Archive database.

8. Click the Create button.
9. To exit, click OK.

***Tip**. You can create a blank database for your company's use. Repeat step 7 and 8 substituting a name and description of your own choosing; for example, Default and Personnel Database.*

Upgrading Databases from Previous Personnel Director Versions

You only need to perform this procedure once.

1. From the Start menu, select Run.
2. From the folder C:\Program Files\Persdir, and select the file PDUpgrade.exe.
3. Double-click the file.
4. Provide the following login information:

   User Name. You cannot update this field, the User Name must be SYSDBA.

   Password. Type **masterkey** or the password your administrator assigned to you.

   Server. Select the server running the Personnel Director database that you want to maintain. The path to the Personnel Director files is displayed below.

   ***Note**: Click the button to the right of the drop-down list button to maintain the list of servers.*

5. Click the OK button to continue run the application.
6. At the end of the upgrade process, click OK.

Changing the SYSDBA Password for Personnel Director Workstations

If you changed default password for Interbase user SYSDBA, please do the following:

***Note**: You need to perform this for each and every Personnel Director workstation.)*

1. From the Start menu, select Run.
2. Click the Browse button to locate the folder where you installed Personnel Director. The default directory is C:\Program Files\PersDir.
3. Double-click the file, ChangePassword.exe.

   This filename appears on the Run screen,
4. Click the Ok button to run this file.
5. Provide the following information:

   Old Password. Type the existing SYSDBA password.

   New Password. Type the new SYSDBA password.

   Confirm Password. Re-type the new SYSDBA password.
6. Click the Save button.

   Personnel Director will now use the new password to connect to the databases.

Installing the Recalculation Program

The installation CD-ROM contains a folder called Recalculate. Running the Setup program in this folder installs a program that you can use to schedule recalculation of Personnel Director screens. For more information on how to install this program and schedule recalculation refreshes with the Windows Task Scheduler, see “Scheduling Recalculation Refreshes” on page 446.

Upgrading from Personnel Manager

If you are a Personnel Manager user, you can very easily upgrade to Personnel Director. The upgrade process will convert all your databases for use with Personnel Director.

The following information is transferred from the Personnel Manager to Personnel Director database:

- Company data
- Employee data
- Diary reminders
- Letter templates
- Leave allowances
- Attached documents

Important Notes

Due to enhancements in Personnel Director, some items are not converted and may therefore require attention before normal use of the converted database. See "Preparing Your Converted Database for Use" on page 32.

- The Wizard does not convert any reports, graphs, data import templates or queries that you created in Personnel Manager.
- The Wizard does not convert the Demonstration database. Use Personnel Director's Demonstration database instead.

Running the Personnel Director Upgrade Wizard

Notes:

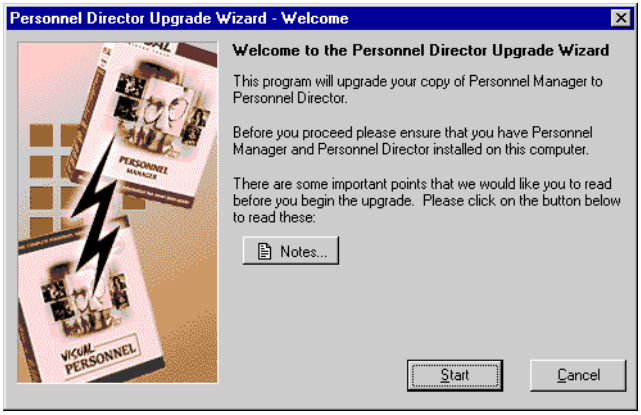
- *Both Personnel Director and Personnel Manager must be available and working before you can convert a database successfully.*
- *The upgrade process may be lengthy. The length of time depends on the amount of data to be converted, the performance of your computer, and if you are on a network, the network speed and amount of traffic. Be patient.*
- *The only database files (.GDB) that should exist on the file server is DEMODATA.GDB. All other databases should be deleted and removed from the Database List. (To remove databases from the Database List, use the Database Maintenance's Database List function; see "Maintaining a List of Personnel Director Databases" on page 440). The Upgrade will*

not transfer data if it finds a Personnel Director database with the same name in the folder (for example, Archive).

To run the Upgrade Wizard

1. If you haven't already done so, install Personnel Director on all required workstations. Check that you can start and run Personnel Director on each workstation.
2. Ensure that all users are logged off. Exit Personnel Manager and Personnel Director. Make sure that the Diary Reminder is not running.
3. Start the Personnel Director Upgrade Wizard.
   - From the Windows task bar, click Start, then Run.
   - Type **c:\Program Files\PersDir\VBTUpgradePD.exe** and click OK.

   The Upgrade Wizard starts and guides you through the upgrade process.


Personnel Director Upgrade Wizard - Welcome
Welcome to the Personnel Director Upgrade Wizard
This program will upgrade your copy of Personnel Manager to Personnel Director.
Before you proceed please ensure that you have Personnel Manager and Personnel Director installed on this computer.
There are some important points that we would like you to read before you begin the upgrade. Please click on the button below to read these:
Notes...
Start
Cancel

4. First click the Notes button to read about some important considerations before you proceed.
5. Click the Start button to start converting your databases.

   A progress meter shows you the status as each conversion proceeds.
6. When the conversion is complete, click Finish.

Preparing Your Converted Database for Use

There are several tasks you should complete in Personnel Director before normal use of the database.

- Recreate any custom reports, graphs and queries.
- Because the security features in Personnel Director have been greatly enhanced, you will need to set up the security privileges for your users.

Starting Personnel Director and Logging In

1. From the Start menu, select Programs>Vizual Business Tools>Personnel Director>Personnel Director

   -or-

   Double-click the Personnel Director icon on the desktop.

   The Personnel Director Login screen appears.

   Provide the following information:

   User Name. Type **USERNAME** as default User Name.

   Password. Enter **password** as the default password.

   > ***Note**: User Names and Passwords to Personnel Director databases can be set and changed using the Security module. For more information, see chapter 3 "Setting Up Security" on page 35.*

   Server. Select the server running the Personnel Director database that you want to maintain. The path to the Personnel Director files is displayed below.

   > ***Note**: Click the button to the right of the drop-down list button to maintain the list of servers.*

2. Click OK.
3. Click the Open Database button.

   -or-

   From the File menu, select Open Database.
4. Select the database you want to use and click the Open button.

3 SETTING UP SECURITY

Use the Security Manager module to set up multiple user accounts, create templates for adding new users, and specify users' privileges for accessing databases, fields, screens, functions, modules, and other employee records.

The Administrator can use the Security Manager module to:

- Change their own password.
- Add or remove Personnel Director user accounts and templates for setting up new user accounts.
- Control the access that users have to Personnel Director databases, screens, fields, functions and modules. For example, you can deny user access to the Security Module itself, deny access to screens such as Exit Interviews and Pay History, or to sensitive fields within screens, and deny access to the records of departments such as Finance and Administration.
- Control the access that users have to the records of other employees.

Starting the Security Manager Module

Note: *You can log in to the Security Manager module only when no other users are logged in to Personnel Director, Database Maintenance or Screen Designer.*

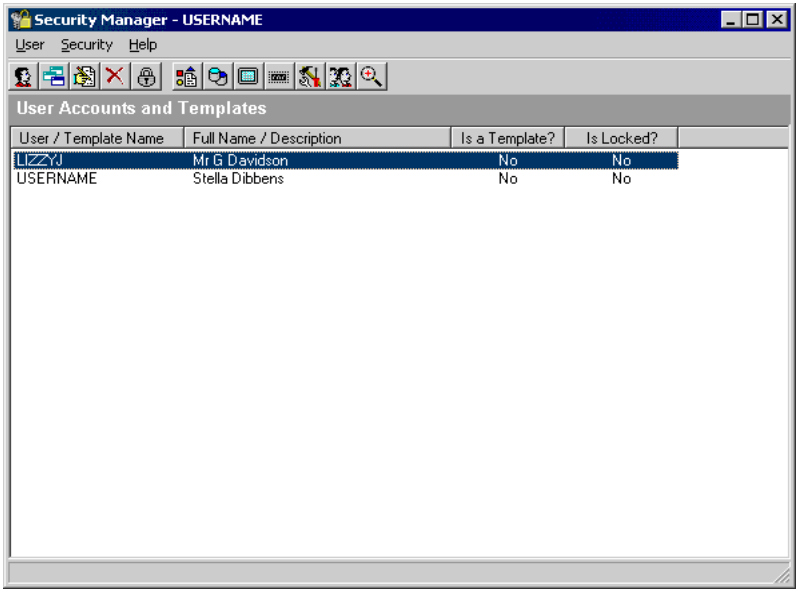
1. From the Start menu, select Programs>Vizual Business Tools>Personnel Director>Security Manager.

   The Security Manager Login screen is displayed.

2. Provide your password and the server where the Personnel Director database you want to use is located. For further instructions, see "Starting Personnel Director and Logging In" on page 32.
3. Click OK.

The Security Manager Screen

The Security Manager screen is shown below:



The Security Manager toolbar contains the following buttons:

	Create a new user account.
	Create a template for adding new user accounts.
	Edit a user account or template.
	Delete a user account or template.
	Lock or unlock a user account or template

	Set up security at the module level
	Set up security for an entire database
	Set up security at the screen level
	Set up security at the field level
	Set up security at the function level
	Set up security at the employee level
	View the audit log

Adding a New User Account

There are three ways to add a new user account:

- specify all the settings in the New User Wizard.
- use a template you have created and saved.
- copy the settings from those of an existing user.

Note: *When you create a user based on the settings in a template or copy the settings of another user, the Wizard copies all access privileges, including the right to access databases, fields, screens, functions, and the records of other employees from the template or user account. To modify these privileges, see* *"Setting Security Privileges for a User Account or Template" on page 45.*

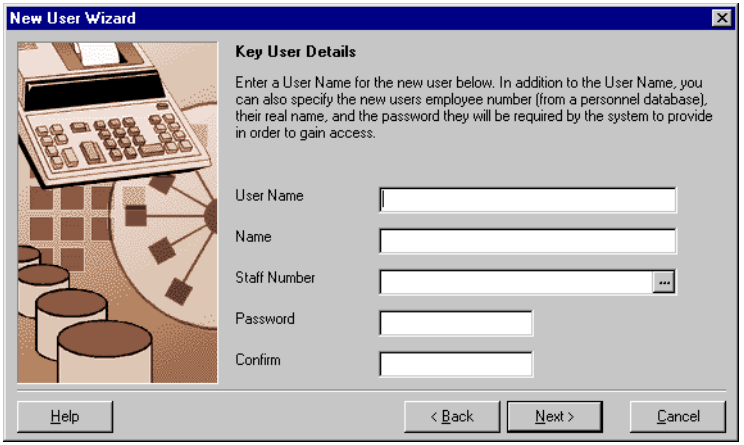
To add a new user account

1. Click the New User button or press Ins.

The New User Wizard appears.

New User Wizard
Welcome to the New User Wizard
This wizard will lead you through the steps required to set up the main details and database access settings for a new user. Optionally you can specify a template or existing user record from which the new user default details are created.
I want to specify all settings myself
I want to use settings from this Template
I want to use settings from this User
Help
< Back
Next >
Cancel

2. Select the I Want To Specify All Settings Myself option.
3. Click Next. In the Key User Details screen, specify the following:


New User Wizard
Key User Details
Enter a User Name for the new user below. In addition to the User Name, you can also specify the new users employee number (from a personnel database), their real name, and the password they will be required by the system to provide in order to gain access.
User Name
Name
Staff Number
Password
Confirm
Help
< Back
Next >
Cancel

User Name. Type a user name.

Name. Type the full user name, including the first name and surname.

Staff Number. Click the Pick List button.

- Select the database that contains the staff member from the Employee Database drop-down list.
- Select the staff number of the employee you are adding as a user.
- Click OK.

Password. Type the password the user will use to log in. The password must be a minimum of 5 characters.

Confirm. Type the password again to confirm. Click Next.

Note: *Users can modify their own password in Personnel Director. We recommend issuing them a default password, and then asking them to change it themselves.*

4. In the User Contact Details screen, specify the following:

Office. Select the office to which the user belongs from the Pick List.

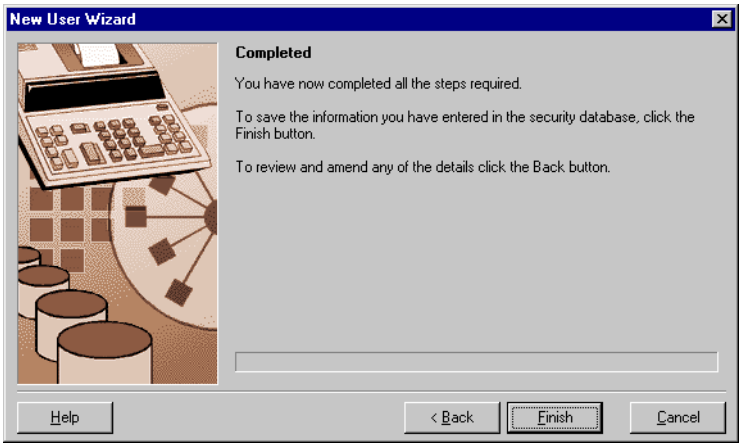
Department. Select the department to which the user belongs from the Pick List.

Location. Select the location to which the user belongs from the Pick List.

Phone No. Type the user's phone number.

E-mail. Type the user's e-mail address.

5. Click Next.


New User Wizard
Completed
You have now completed all the steps required.
To save the information you have entered in the security database, click the Finish button.
To review and amend any of the details click the Back button.
Help
< Back
Finish
Cancel

6. Click Finish.

To add a new user account based on a template you have created

1. Click the New User button.

   The New User Wizard appears.

2. Click I Want to Use Settings From This Template.

New User Wizard
Welcome to the New User Wizard
This wizard will lead you through the steps required to set up the main details and database access settings for a new user. Optionally you can specify a template or existing user record from which the new user default details are created.
I want to specify all settings myself
I want to use settings from this Template
TEMPLATE
I want to use settings from this User
Help
< Back
Next >
Cancel

3. Click the Pick List button and select the template, then click OK.
4. On the Key User Details screen, complete the following information:

- Enter an ID for the new user.
- Type the user's forename and surname.
- Click the Pick List beside Staff Number and select a database and Staff Number, then click OK.
- Type a password for the new user. Type it again to confirm. The password must be a minimum of 5 characters.

5. Click Next.
   - Select the user's department and location using the Pick Lists.
   - Enter the user's phone number and e-mail address.
6. Click Next and then click Finish.

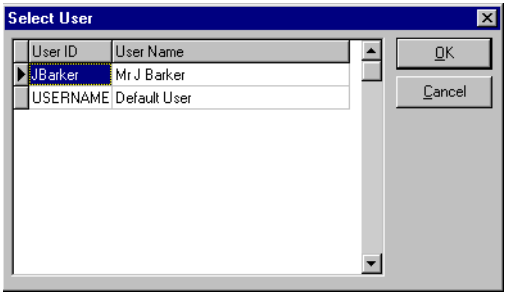
To add a new user account based on the settings of another user

1. Click the New User button.

   The New User Wizard appears.
2. Click I Want to Use Settings From This User.

New User Wizard
Welcome to the New User Wizard
This wizard will lead you through the steps required to set up the main details and database access settings for a new user. Optionally you can specify a template or existing user record from which the new user default details are created.
I want to specify all settings myself
I want to use settings from this Template
I want to use settings from this User
Help
< Back
Next >
Cancel

3. Click the Pick List button.



4. Select the user, then click OK.
5. Click Next.
6. On the Key User Details screen, complete the following information:
   - Enter an ID for the new user.
   - Type the user's forename and surname.
   - Click the Pick List beside Staff Number and select a database and Staff Number, then click OK.
   - Type a password for the new user. Type it again to confirm. The password must be a minimum of 5 characters.
7. Click Next.
   - Select the user's department and location using the Pick Lists.
   - Enter the user's phone number and e-mail address.
8. Click Next and then click Finish.

Creating a Template for User Settings and Privileges

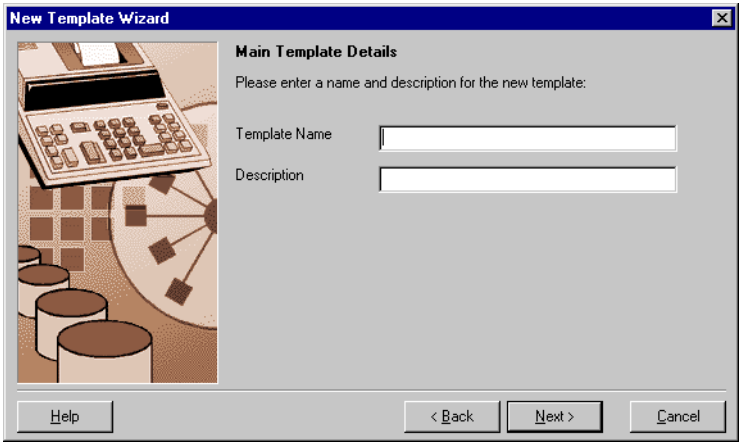
When you create templates, you can copy not only the default user settings and password, but also the defaults you set for access to every screen, field, function, and module in the Personnel Director databases.

1. Click the New Template button.

   The New Template Wizard appears.

New Template Wizard
Welcome to the New Template Wizard
This wizard will lead you through the steps required to set up the main details and database access settings for a new user template. Optionally you can specify a template or existing user record from which the new template default details are created.
I want to specify all settings myself
I want to use settings from this Template
I want to use settings from this User
< Back
Next >
Cancel

2. Click the I Want to Specify All Settings Myself button, then click Next.



3. Provide the following information:

   Template Name: For example, you could name the template Demo1.

   Description: The template description. For example, it might describe the type of access you are granting. For example, Full, No Reporting, or for the databases to which you are granting users access with this template.

4. Click Next, then click Finish.
5. Set the security privileges for databases, screens, fields, functions and modules and employee records as described in "Setting Security Privileges for a User Account or Template" on page 45.

Editing User Accounts or Templates

You can modify the settings for a user, such as their name, password, department and location. You cannot change their user ID.

1. Select the user account or template from the User Accounts And Templates list.
2. Right-click and select Edit, or press F4.
3. Click Next. Modify the user account as required, clicking Next to move through the screens.
4. Click Finish.

Locking and Unlocking User Accounts or Templates

1. Select the user account or template from the User Accounts And Templates list.

2. Click the Lock/Unlock User button.

   When the account or template is locked, Yes appears in the Is Locked? column in the User Accounts and Templates window. Click the Lock/Unlock User button to unlock the account.

   When an account is locked, the user will not be able to log on until you clear the lock. This is useful, for example, when an employee is out of the office for a holiday or business trip. For new users, you may want to lock

an account when you are creating it for a new hire who will start work in a month, at which time you can unlock the account.

Deleting User Accounts or Templates

You can delete user accounts and templates that you no longer require.

1. Select the user account or template from the User Accounts And Templates list.
2. Click the Delete button on the toolbar.

   -or-

   Right-click and select Delete or press Del.
3. Confirm that you want to delete the item.

Setting Security Privileges for a User Account or Template

When a new user or template account is added to Personnel Director, the account is given all security privileges; that is, it is unlocked, and has access to all databases, functions, screens, fields, and employee records. You then modify the security privileges as required. The easiest way to do this is to create a template that contains the most common settings, then create new users based on the template.

1. Take one of the following actions:
   - Select the user account or template from the User Accounts And Templates list.

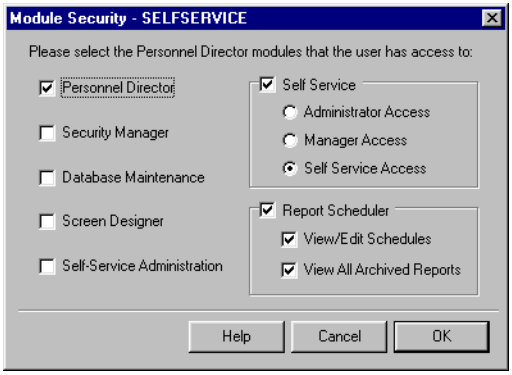
     -or-
   - Right-click and select the item for which you want to set privileges, or click the toolbar button for the item.
2. Go to the heading for the level of security you are setting.

Modifying Module Level Privileges

When a new user or template account is added in Personnel Director, the account is given access to all modules. You can modify a selected user's access to each of the Personnel Director modules.

1. Select the user account or template from the User Accounts And Templates list.

2. Click the Module Security button, or press Ctrl+M.

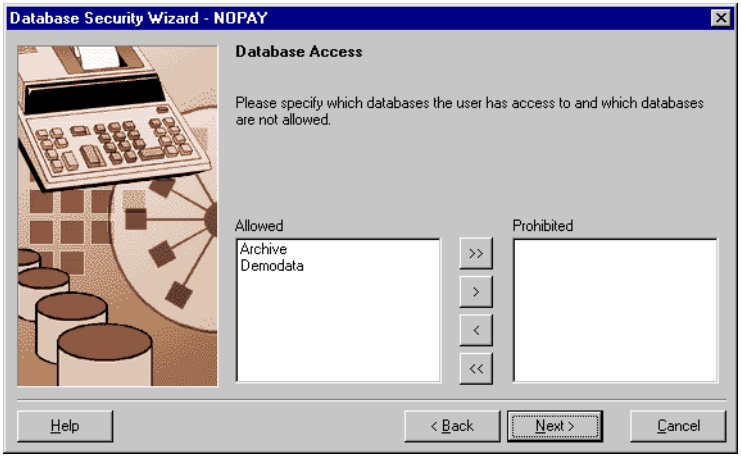


3. To give the account access to a module, leave the checkbox selected; to deny the account access to a module, clear the checkbox.
4. Click OK.

Modifying Database Level Privileges

If you deny access to a database, the user cannot open that database.

1. If you select Databases, click Next to go to the next screen.



2. On the Database Access screen, select which databases the user can access and which ones they are prohibited from accessing.

- To add a database in the Allowed list to the Prohibited list, click the Add button.

- To remove a database from the Prohibited list and make it available, click a database in the Prohibited list and then click the Remove button.

- Use the Add All button to move all the databases in the Allowed list to the Prohibited list.

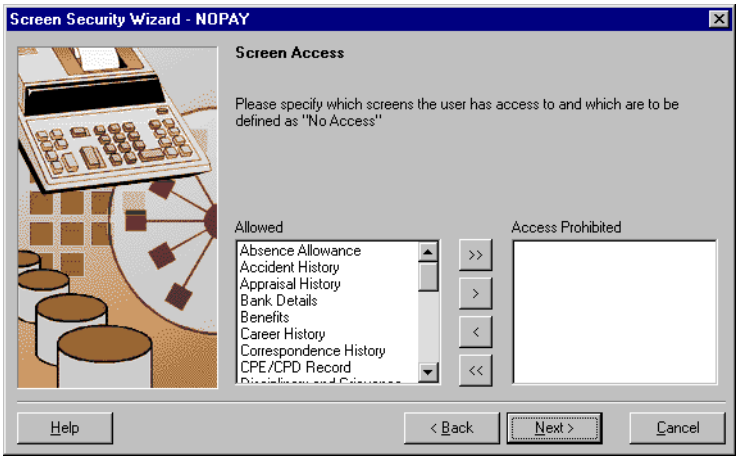
- Use the Remove All button to move all the databases in the Prohibited list to the Allowed list.

3. Click Next, then click Finish.

Modifying Screen Level Privileges

If you deny access to a particular screen, the associated screen button is disabled on the toolbar.

1. If you select Screens, click Next to go to the next screen.



2. On the Screen Access screen, select which screens the user can access and which ones they are prohibited from accessing.

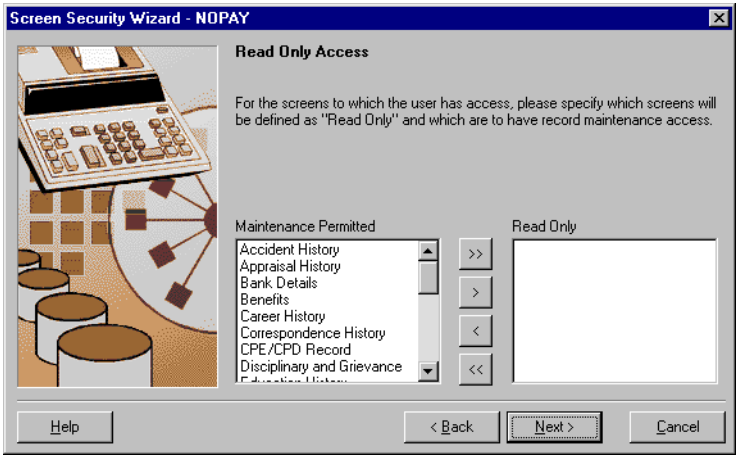
- To add a screen in the Allowed list to the Access Prohibited list, click the Add button.

- To remove a screen from the Prohibited list and make it available, click a screen in the Prohibited list and then click the Remove button.

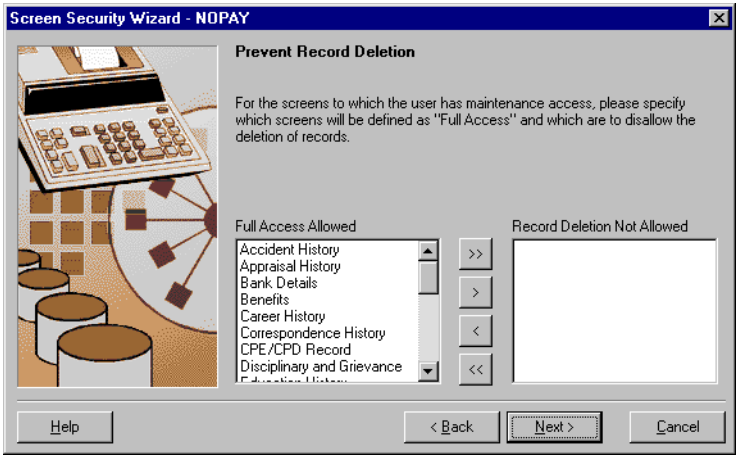
- Use the Add All button to move all the screens in the Allowed list to the Prohibited list.

- Use the Remove All button to move all the screens in the Prohibited list to the Allowed list.

3. Click Next.



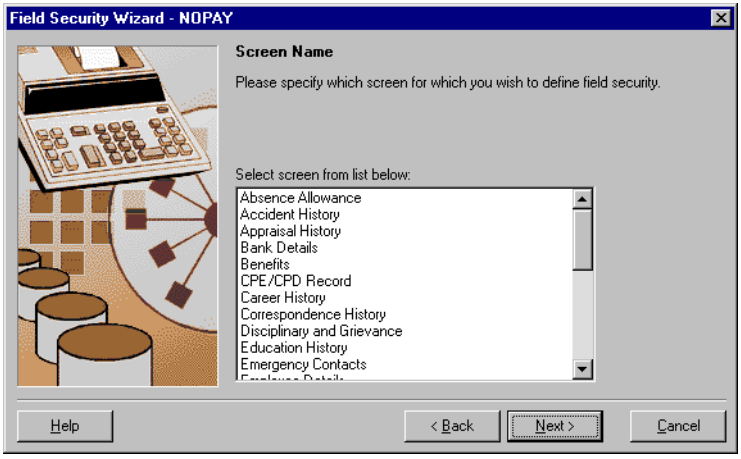
4. To select the screens which the user can access and view, but not change, using the buttons as described above.
5. Click Next.



6. Select the screens which the user can view and change information on, but not delete information from, using the buttons as described above.
7. Click Next, then click Finish.

Modifying Field Level Privileges

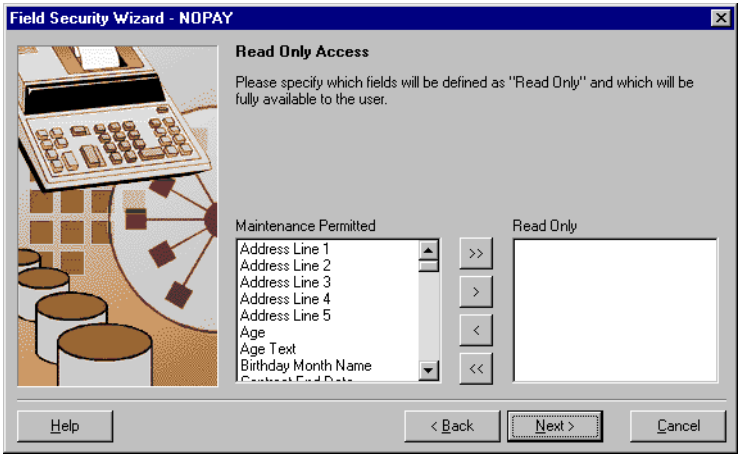
1. If you select Fields, click Next to go to the next screen.



2. On the Screen Name screen, select a screen that you want to define field level privileges.
3. Click Next.

4. On the Field Access screen, select the fields that you do not want the user to access, using the buttons as described above.

5. Click Next.



6. Select the fields that the user can view, but not change information in.
7. Click Next, then click Finish.

Modifying Function Level Privileges

1. If you select Functions, click Next to go to the next screen.

Function Security Wizard - LYNDA
Function Access
Please specify which functions the user has access to and which are prohibited.
Functions Allowed
Archive Employees
Create New Reports, Letters and Graphs
Create or Modify Company Leave Allowances
Delete Attached Documents
Delete Reports, Letters and Graphs
Functions Prohibited
Transfer Employees Between Databases
Help
< Back
Next >
Cancel

2. On the Function Access screen, select the modules or functions that the user has access to using the buttons as described above.
3. Click Next, then click Finish.

Modifying Employee Level Privileges

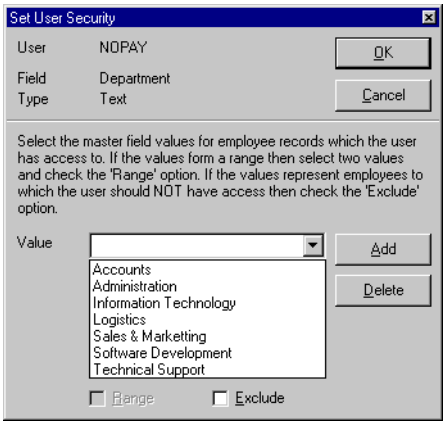
Use employee-level privileges to grant or deny users access to the records of other employees. When a user is denied access to employee records, those records will not appear in the list of users on Personnel Director screens.

1. If you select Employees, click Next to go to the next screen.

2. On the Employee Criteria screen, click the Add button.

Select Employee Master Field
Select the employee master field to be used for employee security.
Address Line 1
OK
Cancel

3. From the drop-down list, select a Master field to use to restrict access.



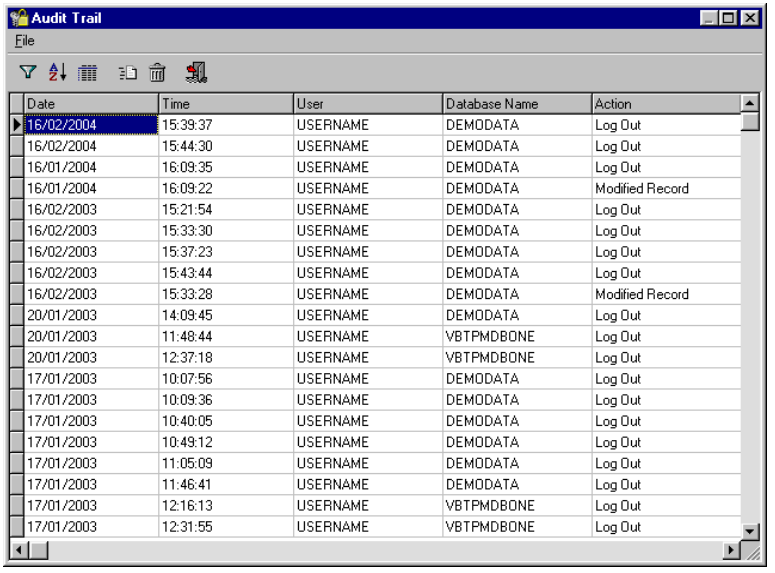
   For example, you might select the Department field to restrict access to records in the Administration and Finance departments. You can select multiple Master fields. For example, you might select both Department and Location to restrict access to Administration and Finance records for the London office.

4. Select the master field values to exclude from access.
   - Select the field value from the drop-down list, then click the Exclude checkbox.
   - If the data in the field contains a range of values, select two values, then click the Range checkbox.
5. Click the Add button to add the excluded value or range of values to the list.
6. Repeat steps 3 to 5 until all the values have been added, then click OK.
7. Check the list in the Employee Criteria screen. Click Next, then click Finish.

Auditing Personnel Director Usage

Use the Audit Log feature of the Security Manager to monitor Personnel Director usage, including the date and time when users log in and out, the database they use and the type of usage (for example, record maintenance).

1. From the Security Manager Security menu, select View Audit Log, or press Ctrl+A.



Date	Time	User	Database Name	Action
16/02/2004	15:39:37	USERNAME	DEMODATA	Log Out
16/02/2004	15:44:30	USERNAME	DEMODATA	Log Out
16/01/2004	16:09:35	USERNAME	DEMODATA	Log Out
16/01/2004	16:09:22	USERNAME	DEMODATA	Modified Record
16/02/2003	15:21:54	USERNAME	DEMODATA	Log Out
16/02/2003	15:33:30	USERNAME	DEMODATA	Log Out
16/02/2003	15:37:23	USERNAME	DEMODATA	Log Out
16/02/2003	15:43:44	USERNAME	DEMODATA	Log Out
16/02/2003	15:33:28	USERNAME	DEMODATA	Modified Record
20/01/2003	14:09:45	USERNAME	DEMODATA	Log Out
20/01/2003	11:48:44	USERNAME	VBTPMDBONE	Log Out
20/01/2003	12:37:18	USERNAME	VBTPMDBONE	Log Out
17/01/2003	10:07:56	USERNAME	DEMODATA	Log Out
17/01/2003	10:09:36	USERNAME	DEMODATA	Log Out
17/01/2003	10:40:05	USERNAME	DEMODATA	Log Out
17/01/2003	10:49:12	USERNAME	DEMODATA	Log Out
17/01/2003	11:05:09	USERNAME	DEMODATA	Log Out
17/01/2003	11:46:41	USERNAME	DEMODATA	Log Out
17/01/2003	12:16:13	USERNAME	VBTPMDBONE	Log Out
17/01/2003	12:31:55	USERNAME	VBTPMDBONE	Log Out

2. Take any of the following actions.

	Filter the list of users and their activities. Select the type and filter criteria and click OK.
	Sort the list of users. Select the sort criteria and sort order and click OK.
	Show all users if a filter has been applied.
	Clear the audit log. Confirm that you want to clear the log.
	Export the Audit Trail details.
	Exit the Audit Trail dialog.

Starting Personnel Director and Logging In

1. From the Start menu, select Programs>Vizual Business Tools>Personnel Director>Personnel Director.
2. Type the password.
3. Select the server to which you want to connect from the Server drop-down list.
4. Click OK.

Note: *If you are a new user, your administrator should have provided you with a User Name and Password and the name of your Server. Click the Pick List button beside the Server field to see the list of available servers, or ask your administrator for this information.*

4 SETTING UP PERSONNEL DIRECTOR

Overview

Before you begin to use Personnel Director, you must enter certain information into the system. This information enables Personnel Director to work in the same manner as your organisation with regard to working hours and pay periods, statutory holidays, absence allowances and currency exchange rates.

If you do not enter this information, you will not be able to use Personnel Director to perform time saving tasks, such as:

- Setting company pay periods.
- Setting currency exchange rates.
- Defining statutory holidays.
- Creating the various absence allowances that your organisation uses.
- Defining employee work periods if absence days lost and hours lost are to be based on an employee's work period rather than the company's pay period.
- Performing absence allowances end of year maintenance.

To set up Personnel Director, you must first enter details about your company. Do this using the Company menu on the main screen. The stages are as follows, and are described in detail in the remaining sections of this chapter:

1. Set the date and currency display formats in Windows. **This is essential.**
2. Enter your company details. **This is essential.**
3. Specify the company logo. This is optional.
4. Enter details about your company's pay periods. **This is essential.**
5. Enter details about currency exchange rates. This is optional.
6. Enter statutory holidays. **This is essential**.

7. Create all the holiday and absence allowances your company uses with the Absence Allowances Wizard. Enter your absence calculation preferences, as described in step 10. **This is essential.**
8. Enter details of any company vehicles. This is optional.
9. If the calculation of absence days lost and hours lost is to be based on employee work periods rather than company pay periods, enter employee master work periods.
10. Specify various preferences about how you want to work with Personnel Director, including the following:
    - general preferences screen and window display.
    - the word processing, spreadsheet and diary applications to use.
    - whether or not to include weekends and company holidays in absence calculations, whether or not to base the calculation of absence days lost and hours lost on company pay periods or on employee work periods. You can also set the limit on the number of employees to display on the Absence Schedule chart.

Using the Personnel Director Setup Wizard

A Wizard is provided to take you through the stages of setting up Personnel Director including configuring your mail server host name. This Wizard is displayed when Personnel Director is used for the first time, but it can be displayed at any time in the following way.

- Select Setup Wizard from the Help menu.

Setting Display Formats

Personnel Director uses your Windows settings to determine how to display dates and currencies. In Personnel Director, dates are displayed in (and must be entered in) the format specified in your Short Date Format setting in Windows. In order to store dates beyond 31st, December 1999 you must specify a four-digit year format in your Windows settings. Currency amounts are displayed according to the Currency Format settings in Windows.

Setting the Date Format Used by Windows

1. Click the Start button and select Settings, then Control Panel.
2. Double-click on the Regional Settings icon.
3. Click on the tab folder labelled Date.
4. In the Short Date section enter the date format that you require in the Short date style, dd/mm/yyyy, for example. Ensure the date format you enter has a four digit year (yyyy).

Year 2000 Compliant Date Windows

Date Windows determine how 2-digit years are interpreted. All calendar buttons have a Date Window of 1950 and work as follows:

2 Digit Date Entered	Interpreted Date
00-49	2000-2049
50-99	1950-1999

Use the Regional Settings option in the Control Panel to set up a four-digit date format to ensure that dates are entered and interpreted correctly.

Setting the Currency Format Used by Windows

1. Click the Start button and select Settings, then Control Panel.
2. Double-click on the Regional Settings icon.
3. Select the correct region for the date, time, currency, and number format you want to use.
4. Click on the Currency tab folder.
5. Verify that the currency symbol is the one you want to use in Personnel Director.

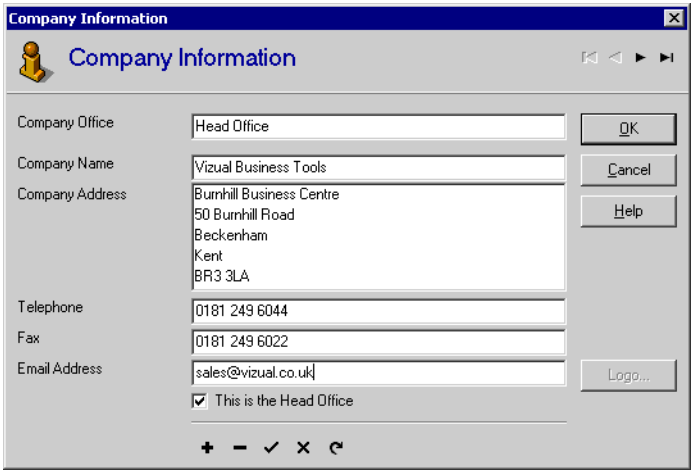
Entering Company Information

Use the Company Information screen to enter details about your company.

You set up the company information on an office by office basis. After you provide the office name, address and telephone information, you can then add its logo and statutory holidays.

For example, you may have a company with offices in England, France and Germany; each has a different address, logo and statutory holidays. By setting the company details for each, you can assign each employee the appropriate holidays and generate the appropriate company information when printing letters, faxes, and other documents including reports.

1. On the main screen, select Company Information from the Company menu. The Company Information screen is displayed.



2. Enter the following information about this office:

   Company Office. Type a unique name to be used for this office. You can set up as many offices as are needed.

   Company Name. Type the name of the company. By doing this your company's name will automatically appear as the default company name in all reports, letters, memos and faxes.

   Company Address. This address is used when creating letters, faxes and memos. Ensure that each line of your company's address appears on a

separate line in the address box by inserting the cursor at the beginning of the line.

Telephone. Type the phone number.

Fax. Type the fax number.

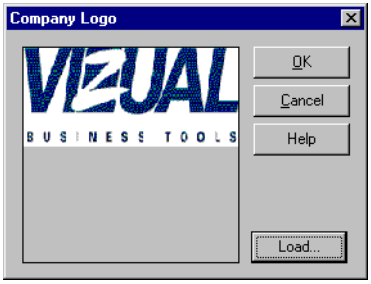
Email Address. Type the e-mail address.

This Is The Head Office. If the office information applies to the head office, click this checkbox. Note: Employees not assigned to a specific office are automatically assigned to the office you designate as the head office; for example an employee not assigned to a specific office automatically gets the statutory holidays assigned the head office.

3. Use the following buttons to add, delete, edit, and post changes to records.

Button	Action
+	Insert a new company record.
−	Delete the current company record.
✓	Post changes made to the current company record
✕	Cancel changes made to the current company record
↻	Refresh the current company record.

4. To add or change the logo, click the Logo button.



- To change the logo, click the Load button. Use the file list to browse and select the required logo. The logo must be a bitmap image (.BMP).
- Click the OK button to save the new logo, or the Cancel button to exit without saving any changes.

Note: *To fit your company logo in Personnel Director reports, the logo should be no larger than 6 x 2 cm (255 x 80 pixels). If your logo is larger, adjust the report header accordingly or the logo will not appear.*

5. Click the OK button to save this information, or the Cancel button to cancel it.

Setting the Office

If the company has been set up with several offices, you must indicate which company details are to be used for mail merges and reports. For more information about setting the company up with offices, see "Entering Company Information" on page 60.

1. From the View menu, select Set My Office.

   The Set My Office screen appears.

Set My Company Office
Use this screen to specify which Company Office you work within.
The Company Office determines which Company Details will be used when peforming mail merges and running reports.
Company Office:
Head Office
OK
Cancel

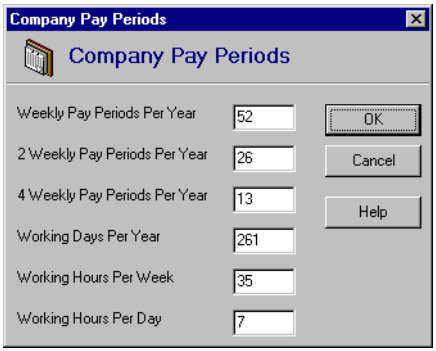
2. Select the office from the Company Office drop-down list and click OK.

Defining Company Pay Periods

You need to specify various pay periods per year. These figures are used in the Pay Details screens to calculate an employee Pay Per Period.

Tip: *For more information about the formulas used to calculate pay amounts based on the pay period information entered here, see "Understanding Pay Period Calculations" on page 597.*

1. Select Company Pay Periods from the Company menu. The Company Pay Periods screen is displayed.



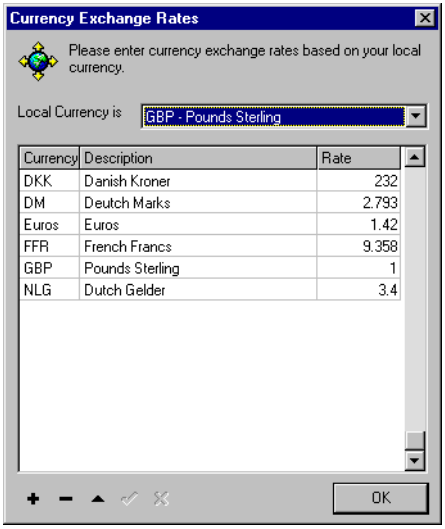
2. Enter the number of Weekly, 2 Weekly, and 4 Weekly pay periods per year.
3. Enter the number of paid working days per year.
4. Enter the number of paid working hours per week.

   This is an important field, as it is used as the default value for Contracted Hours when creating a new Pay Record for an employee. The Contracted Hours value is used when calculating the amount of overtime worked in the Time Sheet screen.
5. Enter the number of paid working hours per day.
6. Click the OK button to save your entries, or the Cancel button to cancel them.

Entering Currency Exchange Rates

You need to select your local currency or define it if it is not included in the currency list. In addition, you must have an entry for Euros, so that Personnel Director can calculate and display amounts in both local currency and Euros.

1. Select Currency Exchange Rates from the Company menu.



2. Select your local currency from the Local Currency drop-down list.
3. Use the following buttons to add, delete, edit, and post changes to exchange rates.

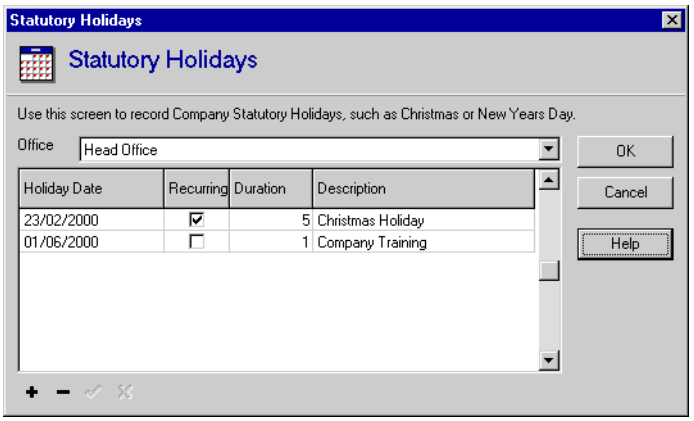
Button	Action
+	Insert a new currency exchange rate record
−	Delete the current currency exchange rate record
▲	Edit the current currency exchange record.
✓	Post changes made to the current currency exchange record
✕	Cancel changes made to the current currency exchange record

4. To insert a new record, click the Insert button, then type the currency abbreviation, description, and current exchange rate.
5. When you finish entering currency exchange rates, click the OK button.

Entering Statutory Holiday Settings

You can record all the statutory holidays observed by your company. If you set up your company with multiple offices, you can define the holidays for each office. (For more information about setting up offices, see "Entering Company Information" on page 60.) Statutory holidays are displayed in red on the Absence Calendar.

1. Select Statutory Holidays from the Company menu.



2. Select the office that you want to define holidays for from the Office drop-down list.
3. To insert a statutory holiday, press the Insert button or the Insert key on your keyboard, then type the start date (if the holiday is for more than one day) or select the date from the drop-down calendar.
4. If the holiday recurs each year, check the recurring checkbox; if not uncheck it.
5. If the holiday extends over more than one day, enter the duration.
6. Type the description.
7. Press Post Edit to finish entering the holiday.

Use the following buttons to insert records, delete existing records and post and cancel changes.

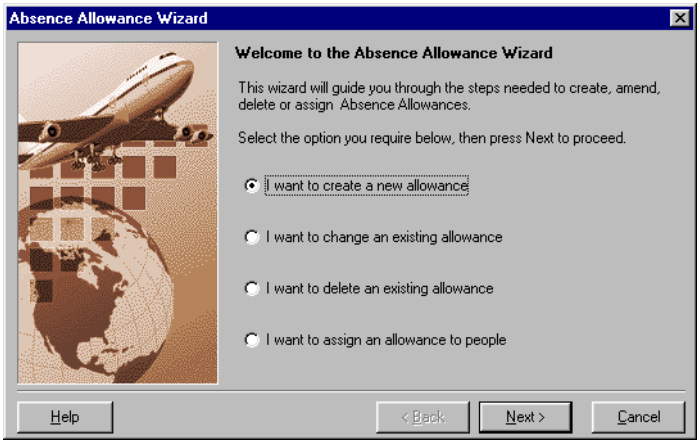
Button	Action
	Insert a new statutory holiday record
	Delete the current statutory holiday rate record
	Post changes made to the current statutory holiday record
	Cancel changes made to the current statutory holiday record

8. Click OK when you are finished defining statutory holidays.

Defining Company Absence Allowances with the Absence Allowance Wizard

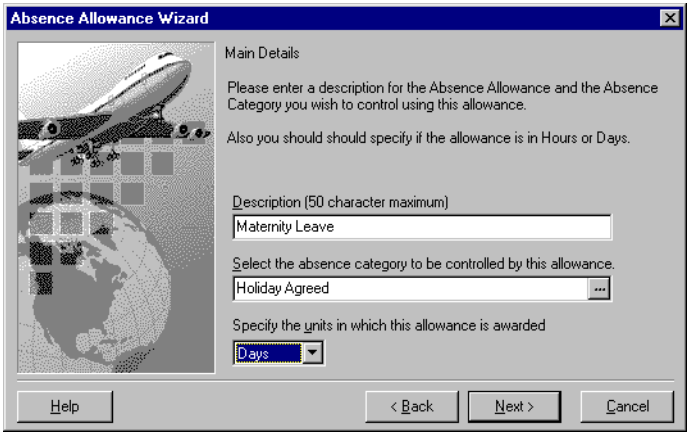
Absence allowances within Personnel Director are based on the employee's length of service with the company, age, or neither of these criteria. Each employee can have their own set of absence allowances, but using the Absence Allowance Wizard saves time by setting default absence allowances. You can assign any of the absence allowances defined with the Wizard to a group of employees, to all employees, or to a list of employees using a filter. You can also set the start date for each absence allowance on an individual, group, or global basis. For more information, see "Setting and Displaying Absence Allowances" on page 177.

1. Select Absence Allowances from the Company menu. The Absence Allowance Wizard screen is displayed.


Absence Allowance Wizard
Welcome to the Absence Allowance Wizard
This wizard will guide you through the steps needed to create, amend, delete or assign Absence Allowances.
Select the option you require below, then press Next to proceed.
I want to create a new allowance
I want to change an existing allowance
I want to delete an existing allowance
I want to assign an allowance to people
Help
< Back
Next >
Cancel

2. Click the I Want To Create a New Allowance radio button, then click Next.

   The Main Details screen appears.


Absence Allowance Wizard
Main Details
Please enter a description for the Absence Allowance and the Absence Category you wish to control using this allowance.
Also you should should specify if the allowance is in Hours or Days.
Description (50 character maximum)
Maternity Leave
Select the absence category to be controlled by this allowance.
Holiday Agreed
Specify the units in which this allowance is awarded
Days
Help
< Back
Next >
Cancel

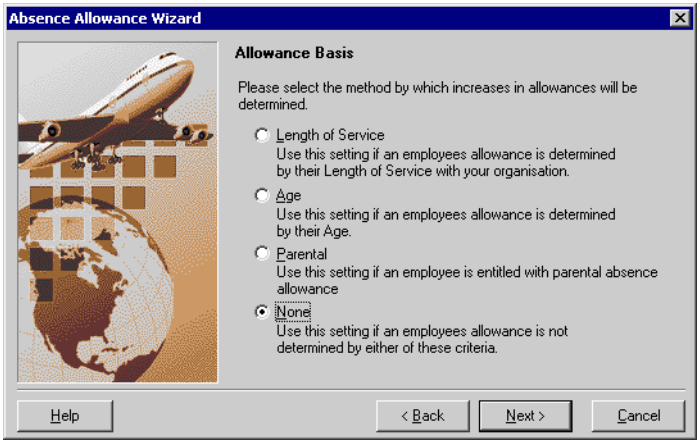
3. Enter a description of the Absence Allowance of up to 50 characters. For example, if you are entering an allowance for Maternity Leave, enter that text.
4. Select an Absence Category or enter a new category.

- To select a category, click the Pick List button. Select a category from the list and then click the Select button.
- To add a new category, type a category name, then click the Add button. For example, Paid or Unpaid. Then click the Select button.

5. Select Days or Hours from the Units drop-down list.

   The Absence Allowance units for the type of absence you are defining will default to the Units specified on this screen.

6. Click Next. The Allowance Basis screen appears.


Absence Allowance Wizard
Allowance Basis
Please select the method by which increases in allowances will be determined.
Length of Service
Use this setting if an employees allowance is determined by their Length of Service with your organisation.
Age
Use this setting if an employees allowance is determined by their Age.
Parental
Use this setting if an employee is entitled with parental absence allowance
None
Use this setting if an employees allowance is not determined by either of these criteria.
Help
< Back
Next >
Cancel

7. Select one of the following, depending on how your company awards this category of allowances. Then click Next.

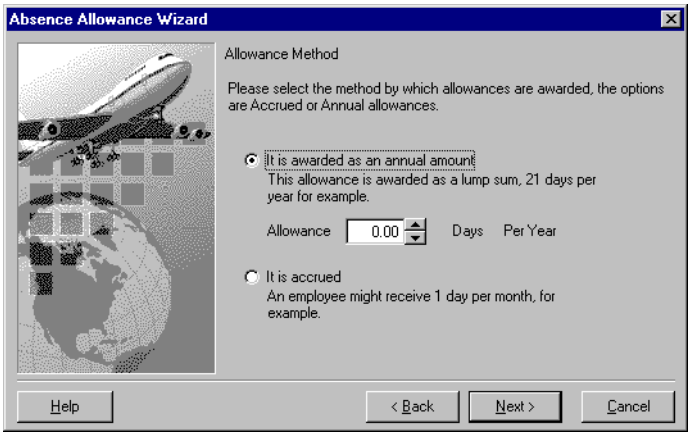
   Length of Service: If the number of days or hours to which employees are entitled is based on their length of service. If you select Length of Service, go to step 9.

   Age: If the number of days or hours to which employees are entitled is based on their age. If you select Length of Service, go to step 9.

   Parental: If the employee has dependants and is entitled with parental leave, select this option. If you select Parental, go to step 13.

   None: If the number of days or hours to which employees are entitled is not based on either length of service or age. If you select None, go to step 8.

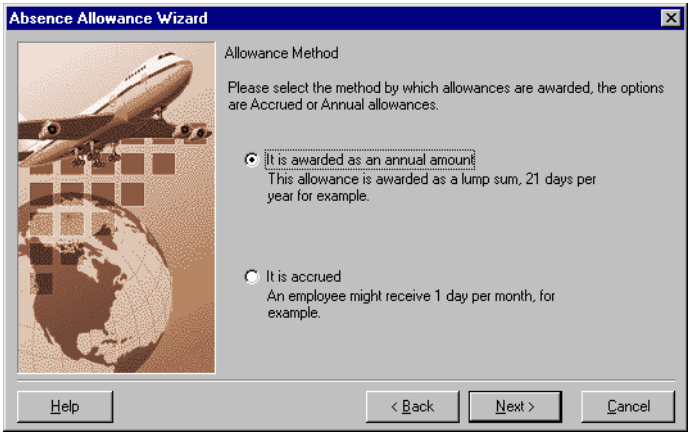
8. On the Allowance Method screen, select the calculation method as follows. Then click Next and go to step 12.


Absence Allowance Wizard
Allowance Method
Please select the method by which allowances are awarded, the options are Accrued or Annual allowances.
It is awarded as an annual amount
This allowance is awarded as a lump sum, 21 days per year for example.
Allowance
0.00
Days
Per Year
It is accrued
An employee might receive 1 day per month, for example.
Help
< Back
Next >
Cancel

It Is Awarded As An Annual Amount: Check this radio button if a certain number of days or hours are awarded on an annual basis. Then enter the number of days allowed per year in the text box.

It Is Accrued: Check this radio button if a number of days or hours are accrued per week or per month during the year. Then enter the number of days accrued and select either Week or Month from the drop-down list.

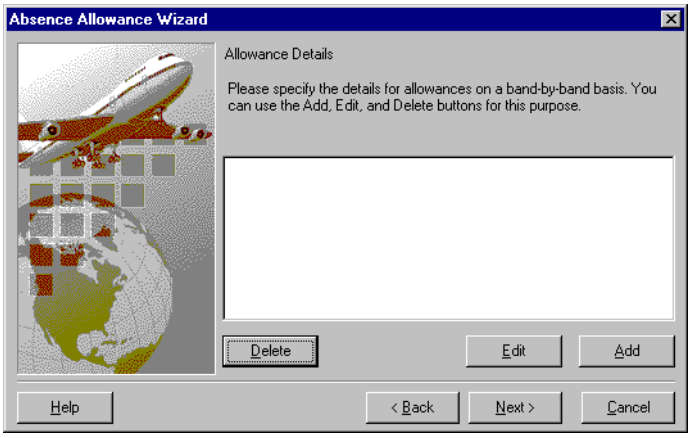
9. On the Allowance Method screen, select the calculation method as follows. Then click Next and go to step 10.


Absence Allowance Wizard
Allowance Method
Please select the method by which allowances are awarded, the options are Accrued or Annual allowances.
It is awarded as an annual amount
This allowance is awarded as a lump sum, 21 days per year for example.
It is accrued
An employee might receive 1 day per month, for example.
Help
< Back
Next >
Cancel

It Is Awarded As An Annual Amount. Check this radio button if a certain number of days or hours are awarded on an annual basis.

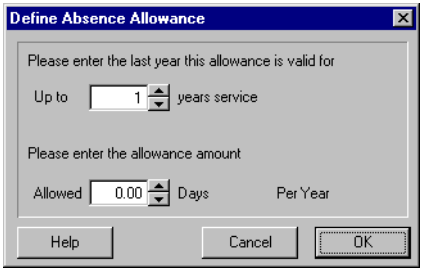
It Is Accrued. Check this radio button if a number of days or hours are accrued per week or per month during the year.

10. The Allowance Details screen appears.


Absence Allowance Wizard
Allowance Details
Please specify the details for allowances on a band-by-band basis. You can use the Add, Edit, and Delete buttons for this purpose.
Delete
Edit
Add
Help
< Back
Next >
Cancel

Do the following:

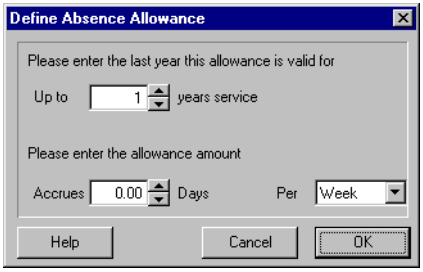
- If you selected It Is Awarded As An Annual Amount in step 9, complete the following steps on the Allowance Details screen. Otherwise, if you selected It Is Accrued, go to step 11.
- Click the Add button.



- On the Define Absence Allowance screen, select the last year in the range for which the annual allowance is valid.
- For example, if it is valid for employees from year one to three, select 3.
- Then select the number of days allowed per year and click OK.

  Type the numbers, or select them by clicking the ▲ and ▼ buttons.

11. Complete the following steps on the Define Absence Allowance screen.
    - Click the Add button.



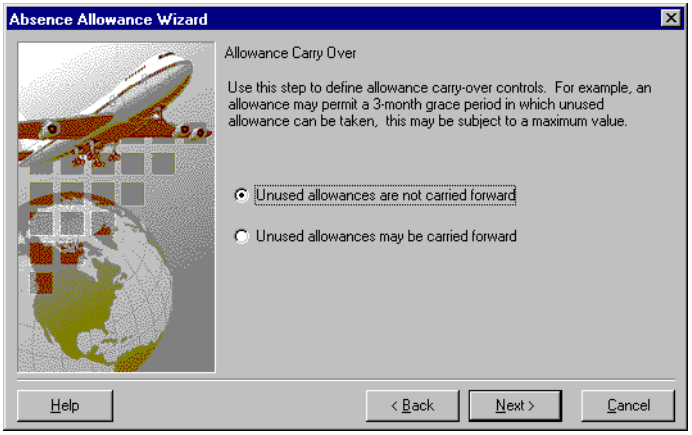
    - Select the last year in the range for which the allowance is valid.

      For example, if it is valid for employees from year one to three, select 3.

      Type the numbers, or select them by clicking the ▲ and ▼ buttons.
    - Select the number of days accrued, then select the accrual period (Per Week or Per Month) and click OK.

      For example, if 1 day is accrued per month, enter Accrues 1 day Per Month.

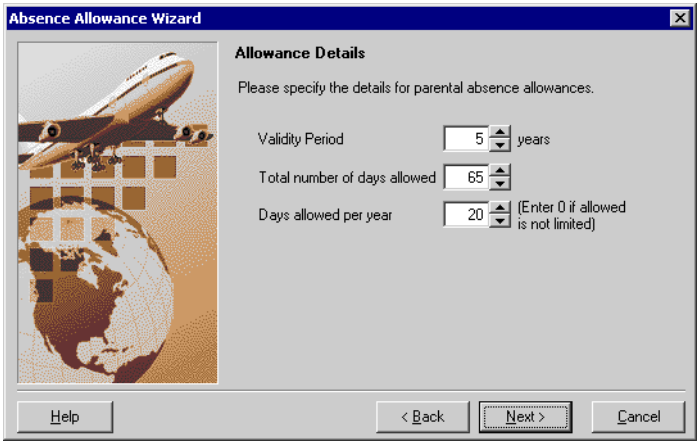
12. Click the Next button. The Allowance Carryover screen appears.


Absence Allowance Wizard
Allowance Carry Over
Use this step to define allowance carry-over controls. For example, an allowance may permit a 3-month grace period in which unused allowance can be taken, this may be subject to a maximum value.
Unused allowances are not carried forward
Unused allowances may be carried forward
Help
< Back
Next >
Cancel

    - Specify whether or not unused allowances are carried forward to another year by clicking the appropriate radio button. If you select Unused Allowances May Be Carried Forward, specify whether the

carried-forward allowances are subject to a time limit or to a maximum amount by clicking the appropriate checkbox.

13. If you selected Parental, provide the allowance details



- Select or type the period (in years) that parental leave is valid.
- Select or type the number of parental leave days allowed over the period.
- Type or select the number of parental leave days allowed each year. Enter 0 if the number of days is unlimited.

14. Click the Next button and then click Finish.

Editing Company Absence Allowances

If you want to change the definition of a company absence allowance:

1. Select Absence Allowances from the Company menu. The Absence Allowance Wizard screen is displayed.
2. Click the I Want To Change An Existing Allowance radio button, then click the Pick List button.
3. Select the allowance you want to modify, then click OK.
4. Modify the details as described above.

Deleting Company Absence Allowances

To delete a company absence allowance, follow this procedure. Deleting an absence allowance also deletes all employee absence allowances based on that allowance in the current year. Optionally, you can delete matching allowances for previous years.

1. Select Absence Allowances from the Company menu.
2. Click the I Want To Delete An Existing Allowance radio button, then click the Pick List button.
3. Select the allowance you want to delete, then click OK.
4. To delete only allowances in the current year, click the Finish button. To delete matching allowances for previous years, click the Delete Personal Allowances History button, then click Finish.

For more information about how you can use Personnel Director to record and monitor employees' holiday and absence periods and perform end-of-year maintenance, see "recording and Tracking Holiday and Absence" on page 169.

Defining Employee Work Periods

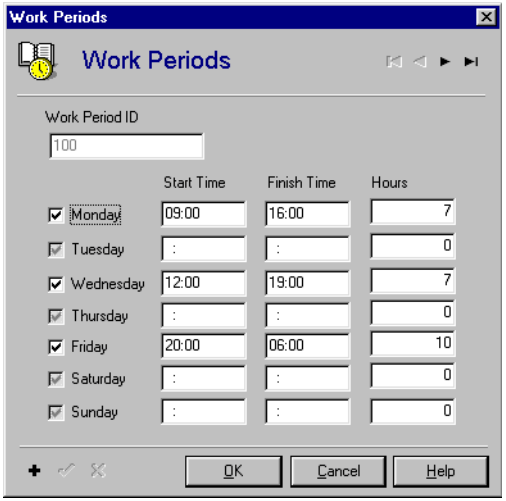
Calculations of absence days lost and hours lost can be based on company pay periods (all employees work fixed work hours and days) or on an employees' work periods (employees work varying work hours and days).

To set work periods, you can define one or more master work periods and then assign them to individual employees; calculations for any employee not assigned a work period will be based on the company pay period.

***Note**: Be sure to set Personnel Director to calculate absence days lost and hours lost based on employee work periods. For instructions, see "Setting Absence Preferences" on page 85.*

To define a master work period

1. Select Work Periods from the Company menu. The Company Vehicles Summary screen is displayed.



2. Take one of the following actions:

   - To insert a new Work Period master, click the Insert button.
   - To update an existing Work Period master, use the navigation buttons to display the master you want to work with.

3. Type a name for this Work Period master; for example Flexible Time.
4. For each day and its associated hours, do the following:
   - Select the checkbox for the day worked.
   - Specify the start and end times of the hours to be worked (Personnel Director automatically calculates the hours from the Start and End times entered). You can also type the number of hours directly.

5. Press Post Edit to finish entering the work period.

   Use the following buttons to insert records, post and cancel changes.

Button	Action
	Insert a new work period master record

✓	Post changes made to the current work period master record
✗	Cancel changes made to the work period master record

6. Click OK when you are finished defining work period masters.

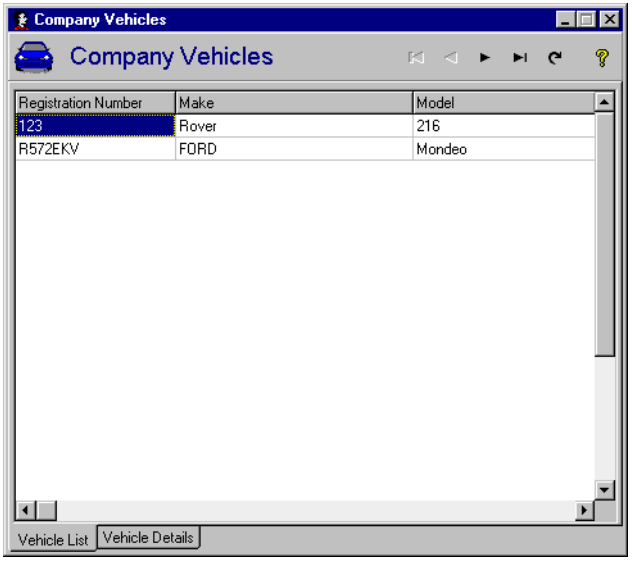
Entering Company Vehicle Data

You can store data on vehicles owned or leased by the company, record company vehicle usage, and report on this data.

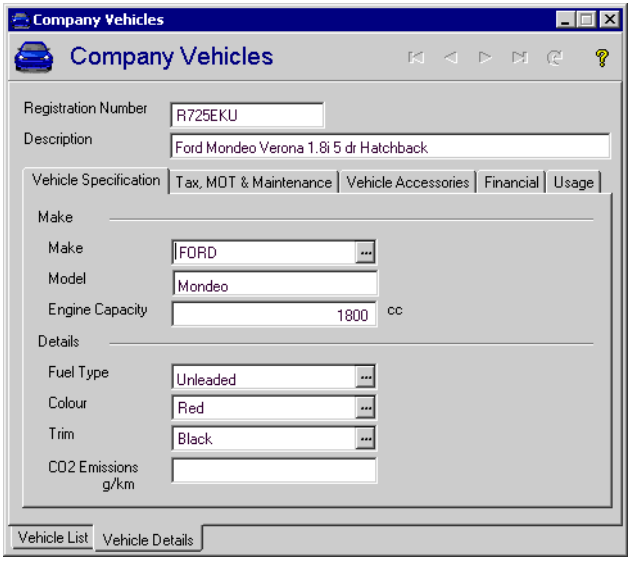
The first stage of this process is to create a list of vehicles operated by the company. You can then enter vehicle usage information on the Vehicle Usage screen. Once this information has been entered, you can view vehicle usage by employees on the Usage tab.

Accessing Company Vehicle Data

1. Select Vehicles from the Company menu. The Company Vehicles Summary screen is displayed.



2. To display the details about a particular vehicle, click the Vehicle Details tab, or double-click the vehicle you want to see details for.



Automatically Updated Data on the Usage Tab

Besides the data you enter about company vehicles, the Usage tab displays the following data that is automatically updated as you use Personnel Director.

Date of Car Use: Date on which employees used this vehicle.

Miles Traveled: This is the total number of miles the vehicle has been driven by employees entered into Personnel Director. This is a calculated field and is automatically updated from the Employee Vehicle Usage screen. This is important as it relates to the contracted lease mileage. When the total lease mileage is exceeded, extra costs may be incurred.

Type of Car Use: Business or Personal. There may be additional types, as defined on the Employee Vehicle Usage screen.

Staff Number: Employee number of the employee using the vehicle.

Adding Company Vehicle Details

Do the following for each company vehicle you want to add on the Vehicle Details screen.

1. In the Registration field, type the car's registration number, exactly as it appears (e.g. E345 FGT). This field is mandatory and must be unique for each company vehicle.
2. In Description, type the general description of the vehicle. For example, Ford Fiesta Coupe 2-door.
3. Enter the following data about the vehicle on the Vehicle Specification tab under Make:
   - The make of car. You can select the make from a Pick List, or add new makes to the Pick List (refer to "Pick Lists" on page 105.
   - The model name of the car (e.g. Fiesta is a model, Ford is a make).

     Tip: *Note the difference between make and model.*
   - The engine CC (engine capacity).
4. Enter the following data about the vehicle on the Vehicle Specification tab under Details:
   - The fuel type (propane, gasoline).
   - The colour.
   - The trim colour.
   - The CO_2 emissions in gr/km.
5. Click the Tax, MOT, and Maintenance tab, then enter the following information:
   - Under Road Fund, select the classification or enter a new one by clicking the Pick List button. Enter the Road Fund renewal date and fee.
   - Under MOT, enter the Ministry of Transport certificate due date and certificate number. If no certificate number is required, enter Not Required.
   - Under Service, enter the following:

     The next interim service date and major service date, the odometer reading and date of the last reading.

The contracted lease mileage. This is the maximum amount of miles per annum allowed under a lease agreement. This is important, as if it is exceeded, you may have to pay a penalty.

6. Click the Vehicle Accessories tab and enter the following information:
   - Under Alarm, click the Alarm checkbox if the vehicle has been fitted with one. Specify the alarm code, key code or radio code for disarming the alarm, as applicable.
   - Under Other, click the Mobile Phone Fitted checkbox if the vehicle has been fitted with one. Enter the fuel card company and card number if a fuel card is provided with the vehicle.
7. Click the Financial tab and enter the following information:
   - Under Purchase: the date on which the vehicle was registered. If the vehicle was purchased, select Purchase as the Contract type; if the vehicle was leased, select Lease.
   - If you are leasing the car, the date the lease commenced and the name of the lease company. The date must be entered in the format that you specified in your Date Settings in the Windows Control Panel. See "Setting the Date Format Used by Windows" on page 59.
   - The amount it costs to lease the car per month. You do not need to enter the pound sign.
   - The P11D value. This is the taxable benefit value related to the purchase price of the car.
   - Under Sale, enter sale details if the vehicle has been sold: the date of sale, name of the buyer, and selling price.
8. Click the Save button to add the vehicle to the list of company vehicles, or the Cancel button to cancel the entry.

Changing Company Vehicle Details

1. On the Company Vehicles screen, click the Vehicle Details tab.
2. Use the Navigation Control buttons at the top of the screen to locate that vehicle that you want to change.

3. Change any of the data about the vehicle, as described in "Adding Company Vehicle Details" on page 77.
4. Click the Save button to save the changes, or the Cancel button to cancel them.

Deleting Company Vehicle Details

1. On the Company Vehicles screen, use the Navigation Control buttons to locate the vehicle that you want to delete.
2. Click the Delete button, and confirm the deletion.

Setting Up Preferences

Personnel Director has five types of preferences that you can set:

- **Career Event Preferences:** Use these preferences to specify when Personnel Director should prompt you to create a Career Event. For further details of Career Events, see "Career History" on page 207.
- **Diary Preferences:** Indicate which diary you want to use to create on-screen reminders of important events, such as an employee's end of probation. See "Diary Reminders" on page 277. You can use either the built-in diary or Microsoft Outlook.
- **General Preferences:** Use these preferences to control screen appearance, hide or show the status bar and shortcut bar, and set the size of toolbar buttons at startup.
- **Add-On Preferences:**
  - **Word Processor:** Indicate which word processor you want to use to create mail merge documents — Personnel Director's built-in word processor, or Microsoft Word for Windows.
  - **Spreadsheet:** Indicate which spreadsheet you want to use with Personnel Director — Personnel Director's built-in spreadsheet or Microsoft Excel.
  - **Diary:** Indicate which diary reminder application you want to use with Personnel Director — Personnel Director's built-in diary reminder or Microsoft Outlook.

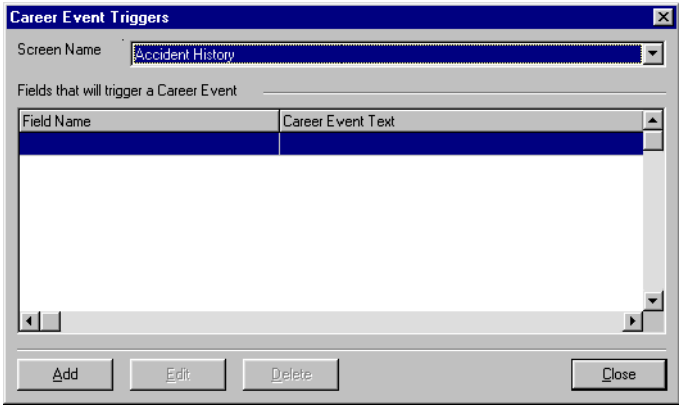
- **Absence Preferences:** Indicate whether to include weekends or holidays or both in calculations of days or hours lost due to absence. Stipulate if the calculation of absence days lost and hours lost is to be based on employee work periods or company pay periods. Define which employee field is used to determine the office the employee is assigned to.
- **Turnover Statistics**: Indicate whether to track the number of employees joining and leaving your organisation. The statistics are automatically updated each time an employee leaves or joins or is transferred between databases.
- **Absence Allowances**: Indicate how absence allowance is to be calculated for employees in your organisation.
- **Employee Number Generation**. Optionally set Personnel Director to generate employee numbers automatically.

Setting Career Event Preferences

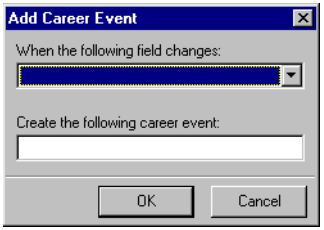
You can specify when Personnel Director should prompt you to create a Career Event. Personnel Director can prompt you to create a Career Event when certain pieces of employee data change, such as department, location or status. When a Career Event is created, it is added to the employee's Career History.

1. Select Career Event Triggers from the Options menu.

   The following screen is displayed.



2. From the Screen name drop-down list, select the screen to be used to create a career event trigger.
3. Click the Add button.

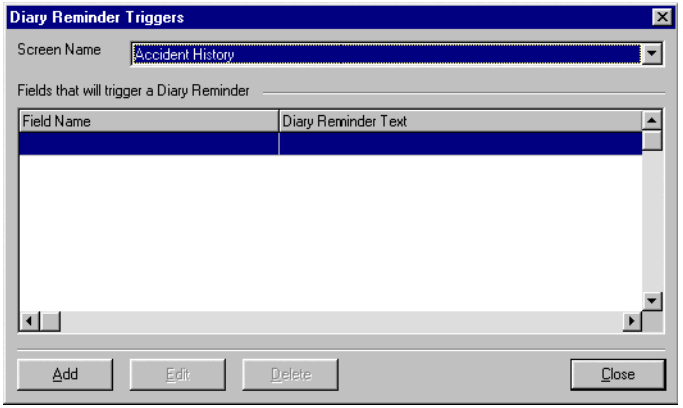


4. Select the field that you want to trigger a career event when the information in it changes.
5. Enter the text that you want to appear when the career event is triggered. For example, you might select the Job Title field on the Employee Details screen and enter the text Promotion Approved as the career event.
6. Click OK.

Setting Diary Reminder Preferences

You can specify when Personnel Director should prompt you to create a Diary Reminder. Diary Reminders provide on-screen reminders of important events, for example an employee's end of probation.

1. Select Diary Event Triggers from the Options menu. The following screen is displayed.



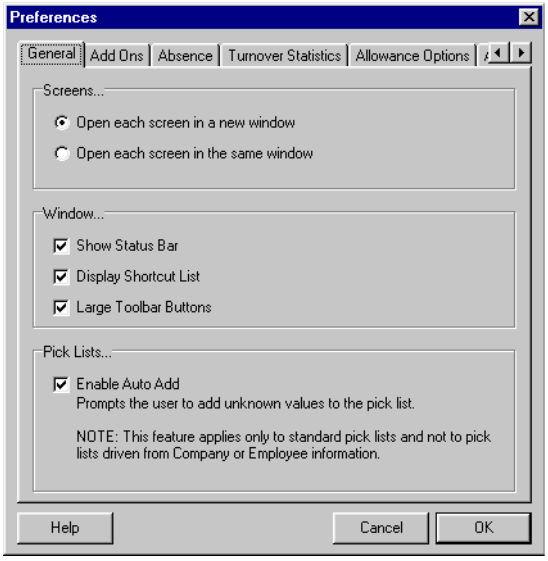
2. Select the screen on which you want to create a diary reminder trigger from the Screen Name List.
3. Click the Add button.

4. Select the field that you want to trigger a diary reminder when the information in it changes.
5. Enter a description of the reminder. For example, you might enter Confirm Contract Renewal to remind you to check on an employee's performance three days before the End of Probation field changes.
6. Specify the number of days, hours, or minutes beforehand that you want to be reminded. Type the number, or use the ▲ and ▼ buttons, then select Days, Hours, or Minutes from the drop-down list.
7. If you have the multi-user version of Personnel Director and want all users to receive a reminder, click the Remind All Users checkbox.
8. Click OK.

Setting Your General Preferences

To specify how you want to open screens and windows, set toolbar button size, and hide or show the Status bar and Shortcut bar, do the following:

1. Select Preferences from the Options menu. The following screen is displayed:



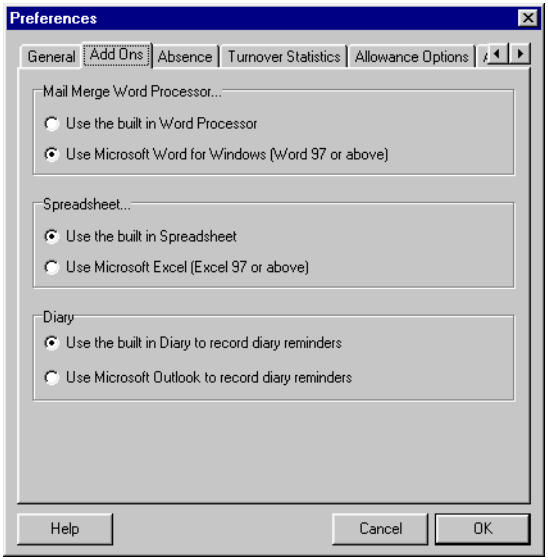
2. Under Screens, specify how you want Personnel Director to display and open screens:
   - To open each screen in a new window, click the Open Each Screen In A New Window radio button.
   - To open each screen in the same window, click the Open Each Screen In The Same Window radio button.
   - To automatically open the Employee Details screen each time you start Personnel Director, click Show Employee Screen On Startup and Open.

3. Under Window, specify the following:
   - Click the Show Status Bar option to turn on or off the display of the Status bar.
   - Click the Display Shortcut List button to turn on or off display of the Shortcut bar.
   - Click Large Toolbar Buttons to display large or small toolbar buttons.
4. Check the Enable Auto Add checkbox under Pick List, if you want Personnel Director to ask if you want to add items to the Pick List when you type new information in a Pick List field. Clear the checkbox if you don't want to be prompted. Note that Auto-Add does not work on pick lists of type Company Data and Employee Data, since the items on these lists are derived from the company and employee information entered in the database. All other pick lists (such as Department or Division) are standard pick lists to which you can add and remove items.
5. Click OK, or click the Add Ons tab to set word processor, spreadsheet and diary reminder application preferences.

Setting Your Add-On Preferences

To specify which word processor, spreadsheet, and diary reminder application you want to use with Personnel Director, do the following:

1. Select Preferences from the Options menu.
2. On the Options screen, click the Add Ons tab. The following screen is displayed.



3. Specify which word processor, spreadsheet and diary reminder you want to use by clicking the appropriate option. If you select Microsoft Word Microsoft Excel, or Microsoft Outlook, the applications must be fully installed on your computer.
4. Click OK, or click the Absence tab to set absence preferences.

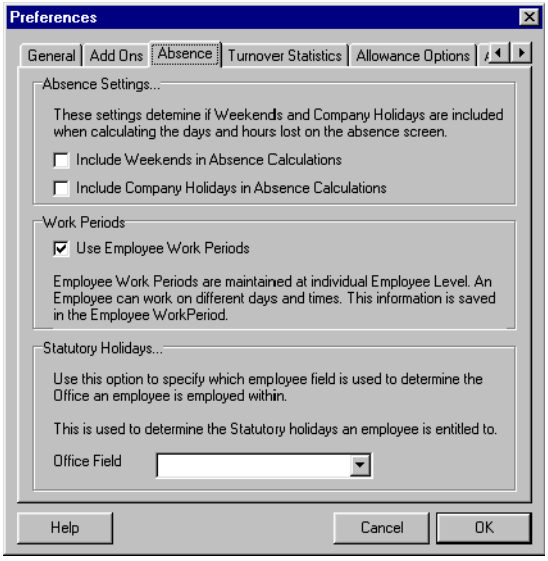
Setting Absence Preferences

You can set Personnel Director to calculate holiday and absence based on company level pay periods or employee lever pay periods:

- Base the calculation of days lost and hours lost on company pay periods (the default) or on employee pay periods.
- Include weekends or company holidays or both in the calculation of hours or days lost due to absence on the Holiday And Absence screen.
- Specify the field which is to be used to determine the company office an employee is assigned to.

To set absence preferences:

1. Select Preferences from the Options menu.
2. On the Options screen, click the Absence tab. The following screen is displayed.


Preferences
General
Add Ons
Absence
Turnover Statistics
Allowance Options
Absence Settings...
These settings detemine if Weekends and Company Holidays are included when calculating the days and hours lost on the absence screen.
Include Weekends in Absence Calculations
Include Company Holidays in Absence Calculations
Work Periods
Use Employee Work Periods
Employee Work Periods are maintained at individual Employee Level. An Employee can work on different days and times. This information is saved in the Employee WorkPeriod.
Statutory Holidays...
Use this option to specify which employee field is used to determine the Office an employee is employed within.
This is used to determine the Statutory holidays an employee is entitled to.
Office Field
Help
Cancel
OK

3. In the Absence Settings section, indicate if weekends and company holidays are to be included in the calculation.
   - To include weekends in all holiday and absence calculations, check the Include Weekends In Absence Calculations checkbox. To omit weekends from time lost calculations, deselect this checkbox.
   - To include company holidays in all holiday and absence calculations, check the Include Company Holidays in Absence Calculations checkbox. To omit company holidays from time lost calculations, deselect this checkbox.
4. In the Work Period section, choose the type of pay period to be used.
   - If employees have differing work periods, select the Use Employee Work Periods checkbox. Personnel Director will calculate absence days lost and hours lost on employees' current work periods (company holidays and weekends are ignored).

The work period is the company pay period, unless you assign a work period to an employee. For more information on how to assign work periods to employees, see "Assigning Work Periods" on page 178.

- If all employees have the same work period, clear the User Employee Work Period checkbox. Personnel Director will calculate absence days lost and hours lost on the company pay periods.

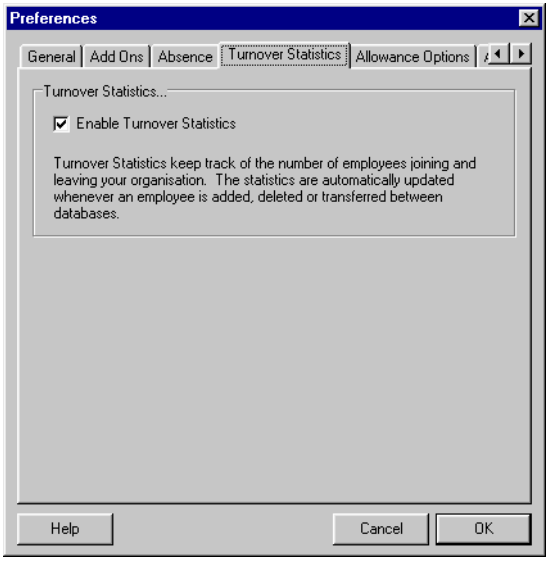
If, for example, your company has a day-shift and evening shift, you would select the Use Employee Work Periods checkbox, then create two master work periods called 'Dayshift' and 'Eveningshift'. You would then assign the appropriate work shift to each employee. If your company only has a day-shift day shift which is the same as the company-level pay period, clear the Use Employee Work Periods checkbox.

5. In the Statutory Holidays section, select the field to be used to link employees to the appropriate offices. This is the office that is used when plotting absence on the calendar or calculating the days/hours lost when adding a new absence record. If you do not select a value, the settings for the office designated as the head office are used. (For more information on head office, see "Entering Company Information" on page 60.)
6. Click OK, or click the Turnover Statistics tab to set turnover statistics preferences.

Setting the Turnover Statistics Preference

You can set whether or not to report on turnover statistics for employees leaving or joining the organization or transferred between databases. If you enable this option, you can display turnover within a database by criteria such as department, location, date, and so on.

1. Select Preferences from the Options menu.
2. Click the Turnover Statistics tab.

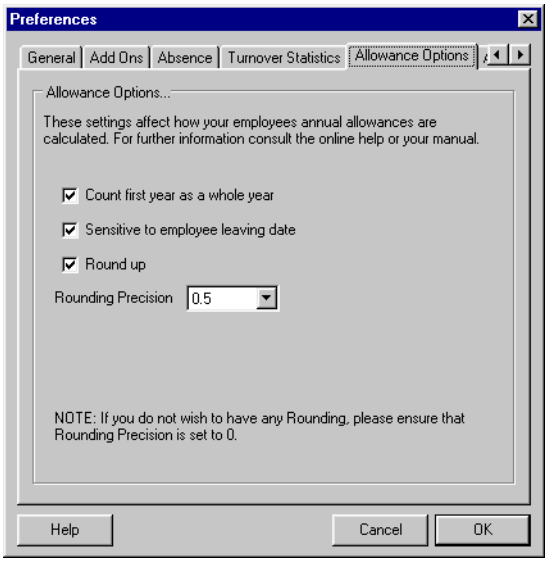


3. Select the Enable Turnover Statistics checkbox to track turnover statistics.
4. Click OK.

Setting Allowance Options

You can set how absence allowance is to be calculated for employees in your organisation.

1. Select Preferences from the Options menu.
2. Click the Allowance Options tab.


Preferences
General
Add Ons
Absence
Turnover Statistics
Allowance Options
Allowance Options...
These settings affect how your employees annual allowances are calculated. For further information consult the online help or your manual.
Count first year as a whole year
Sensitive to employee leaving date
Round up
Rounding Precision
0.5
NOTE: If you do not wish to have any Rounding, please ensure that Rounding Precision is set to 0.
Help
Cancel
OK

3. Provide the following information:

   Count First Year As A Whole Year. Determines how the second year of absence allowance is to be handled for partial employment during the first year. Click this checkbox if a partial year's service is to be treated as a whole year's absence allowance. Clear this checkbox if a partial year's service is not to be treated as a whole year's absence allowance.

   For the next year's allowance (starting on 1 Jan 2001):

   - If you click the Count First Year As A Whole Year checkbox, the first part year (6 months) of service is counted as a whole year and so the employee gets the allowance for "up to 2 years", that is 21 days.
   - If you clear the Count First Year As A Whole Year, Personnel Director determines that on 1 Jan 2001 the employee has 6 months service and therefore is only allocated an allowance for "up to 1 year", that is 20 days.

   Sensitive To Employee Leaving Date. Determines if an employee's date of leaving is to be used in the absence allowance calculation.

For example, if an employee leaves on 30 Jun 2000 and they have an allowance of 20 days starting from 1 Jan 2000, the absence allowance is calculated as follows:

- If you click the Sensitive To Employee Leaving Date checkbox, Personnel Director calculates a pro-rata allowance of 10 days.
- If you clear the Sensitive To Employee Leaving Date checkbox, Personnel Director ignores the leaving date and grants a full 20 days.

When allowances are subject to pro-rata calculations, often there are rounding issues that need to be identified.

Round Up. Determines if the rounding is upwards or downwards. Click the Round Up checkbox to enable rounding up. Clear the Round Up checkbox to enable rounding down.

Rounding Precision. Determines the "to the nearest" factor of the rounding; for example if rounding precision is set to 0.5, rounding is to the nearest half.

Examples:

- if Precision = 0.5 and Round Up **is not** set -, the value 20.9 becomes 20.5
- if Precision = 0.5 and Round Up **is** set, the value 20.9 becomes 21

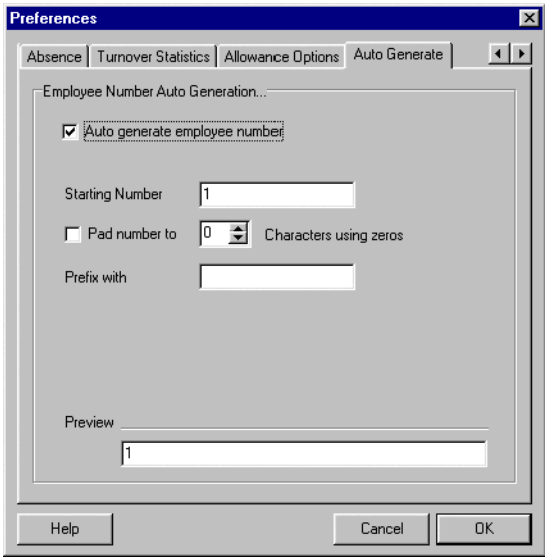
4. Click OK.

Setting Automatic Employee Number Generation Preferences

You can set Personnel Director to automatically assign a unique employee number each time a new employee is added.

To specify the format and increments for the employee number, do the following:

1. Select Preferences from the Options menu.
2. On the Options screen, click the Auto Generate tab. The following screen is displayed.



3. Provide the following information:

   Auto generate employee number. Click this checkbox if you want Personnel Director to generate employee numbers automatically.

   Starting Number. The first employee number to be assigned.

Padding Numbers. Click this checkbox if you want Personnel Director to prefix the employee number with leading zeros automatically

Characters Using Zeros. To prefix the employee number with leading zeros, type the number of zeros you want to use.

Prefix With. To prefix the employee number with a code, type the code. The code can be letters, numbers, or a combination of both; for example, EMP30.

4. Verify the format in the Preview field.
5. Click OK.

5 LEARNING TO USE PERSONNEL DIRECTOR

This chapter describes the conventions used on screens throughout Personnel Director, and explains how you use them.

***Note**: A demonstration database is supplied with Personnel Director. You can use it to evaluate Personnel Director or to try any of the examples in this guide.*

Starting Personnel Director and Logging In

1. From the Start menu, select Programs>Vizual Business Tools>Personnel Director>Personnel Director

   -or-

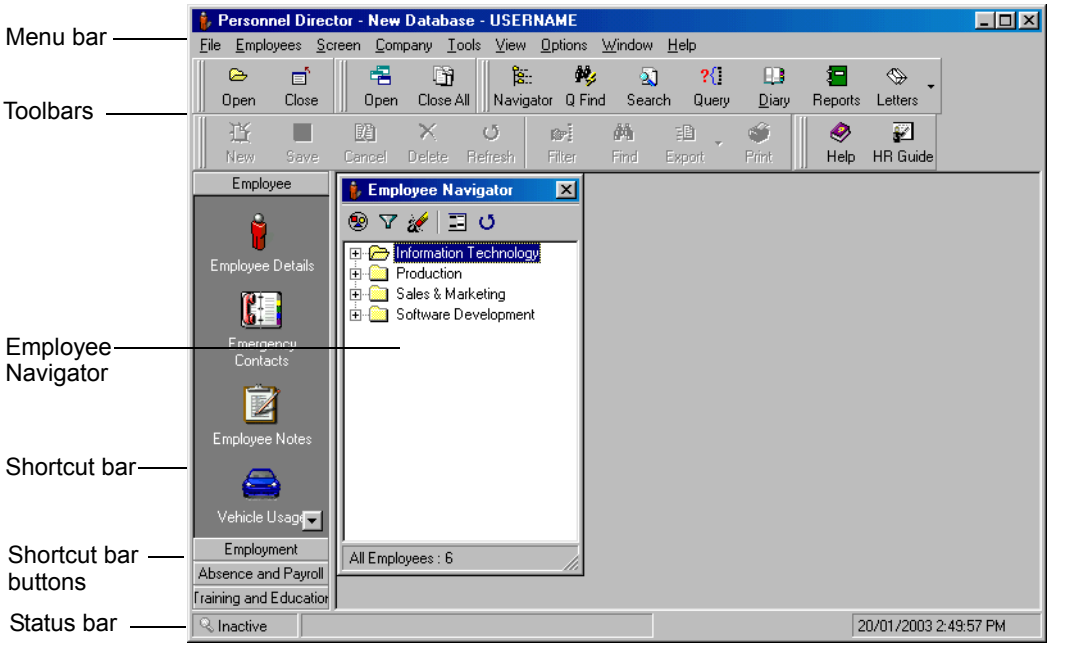
   Double-click the Personnel Director icon on the desktop.

   The Personnel Director Login screen appears.

2. Provide your user name, password and the server where the Personnel Director database you want to use is located. For further instructions, see “Starting Personnel Director and Logging In” on page 32.
3. Click OK.
4. If you haven’t already done so, click the Open Database button, select the database you want to use, and click the Open button.

The Personnel Director Environment

When you start Personnel Director, the main window appears. It contains a menu bar, toolbars, the Employee Navigator, the shortcut bar and the status bar.



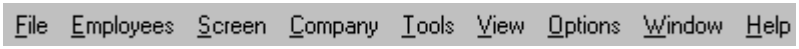
This window is the starting point for accessing all of the functions in Personnel Director. This section describes components that you see on the main window, and how to use them.

- On the top of the window are the menus and toolbars. You can open screens from the menu or from the shortcut bar. The toolbars are organised by function and can be turned on or off as you wish.
- On the left side of the screen is the shortcut bar. Use it to select the type of employee information you want to work with. You can also customise your shortcut bar by changing the icon size and by rearranging, adding and removing icons.

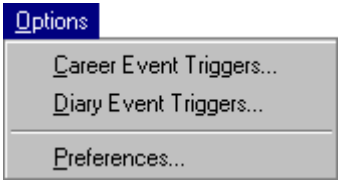
- On the right side of the screen is an area which displays the Personnel Director screens. When you start it displays the Employee Navigator, which you use to select the employees you want to work with.
- At the bottom of the screen is the status bar. Check this bar for the current date and time, and additional information about the current state of Personnel Director.

The Main Menu

The main menu, near the top of the window, is called the “menu bar”.



Each word or group of words on a menu provides access to another menu of related functions. When you click on a word on a menu, a drop-down list appears, showing the menu associated with that word. For example, when you click on Options, the Options menu is displayed:



When you click on an item listed on the menu, you either perform the task described by that item, or go to another screen to perform the task there.

Menus Available from the Main Menu

The following menus are available from the main menu:

- **File menu:** contains functions related to opening and closing databases and printing. You also use this menu to exit Personnel Director.
- **Employees menu:** contains functions used to enter, maintain and display a wide range of employee data and create and maintain employee groups.
- **Screen menu:** contains functions used to create, maintain, filter, find, sort, export, and print employee records.
- **Company menu:** contains functions used to enter information about your company, create and maintain pay periods, currency exchange rates, holiday settings, absence allowances, and vehicles.
- **Tools menu:** contains functions for creating letters, faxes, and other correspondence, displaying and printing reports and graphs, and querying the database. It also contains the Batch Input and Global Update wizards, used to update some of the records in the database, and the Absence Calendar and Absence Schedule.
- **View menu:** contains functions used to display or hide the toolbars, status bar and shortcut bar and set your own personnel record for creating mail merge letters.
- **Options menu:** contains functions used to trigger Career Events and Diary Events, and set certain preferences for how you use Personnel Director.
- **Window menu:** contains functions for arranging windows.
- **Help menu:** contains online help for Personnel Manager, including access for supported users to the Employers' Guide to HR, an online guide to personnel management. It also contains the Personnel Director Setup Wizard, for initially setting up Personnel Director, and the New Employee Wizard for creating new employee records. The "About" option on this menu is where your software version number is displayed.

The Toolbars

Just below the menu bar are the toolbars. You can display or hide any of the toolbars and view them as large or small icons.

There are five separate toolbars that give quick access to menu options.

Screens Toolbar

The Screens toolbar has buttons you use to open and close all the screens in Personnel Director.

Button	Menu Access	Description	Procedure	Shortcut
Open	Screen menu> Open Screen	Open an employee screen	“Working with Employee Data” on page 189	Ctrl+O
Close All	Screen menu> Close All Screens	Close all employee screens		

Record Toolbar

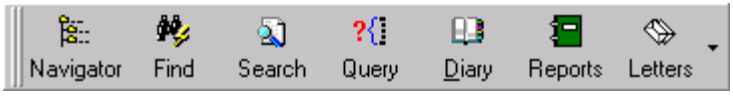
The Record toolbar has buttons you use to work with employee records.

Button	Menu Access	Description	Procedure	Shortcut
New	Screen menu New Record	Create a new employee record	“Creating New Employee Records” on page 149	Ctrl+N
Save	Screen menu> Save Record	Save an employee record		Ctrl+S
Cancel	Screen menu> Cancel Edit	Cancel editing of a record		Esc
Refresh	Screen menu> Refresh Screen	Refresh data displayed on a screen		

Delete	Screen menu Delete Record	Delete an employee record	"Deleting Employee Records" on page 152	Ctrl+D
Filter	Screen menu> Filter Records	Filter employee records	"To select a filter" on page 157" "Using Record Filters" on page 191	Ctrl+I
Find	Screen menu Find Records	Find employee records	"Employee Data Entered on the Employee Details Screen" on page 159	Ctrl+F
Export	Screen menu Export to Spreadsheet Screen menu Export to File	Export employee records	"Exporting Data" on page 130	
Print	Screen menu> Print Records	Print employee records	"Detail Screens" on page 115"	Ctrl+P

Tools Toolbar

The Tools toolbar has buttons you use to locate employees, search and query the database, open the Diary, and create reports, letters, and other correspondence.



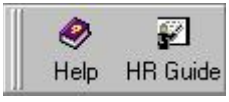
Button	Menu Access	**Description**	**Procedure**	**Shortcut**
Navigator	View menu> Employee Navigator	Locate employees		
Q Find	Employees menu> Quick Find	Quickly search for employees	"Employee Data Entered on the Employee Details Screen" on page 159	Ctrl+Q
Search	Tools menu Search Database	Search the database		
Query	Tools menu> Query Database	Query the database	"Creating Queries" on page 357	

		Open the Diary or Microsoft Outlook	"Using the Diary" on page 275	
	Tools menu> Reports	Create and display reports	"Working With Reports" on page 387	
	Tools menu> Write Letter Tools menu> Write Memo Tools menu> Write Fax	Create standard letters, memos or faxes for one or more employees	"Word Processing and Mail Merging" on page 305	

Note: *When you click the Reports or Letters buttons on the Tools toolbar, the Personnel Director Report List opens. You use the Report List to create and organise letters, reports and graphs. For more information about working in the Report List window, see chapter 13 "Working with Personnel Director Report List" on page 297.*

Help Toolbar

The Help toolbar has buttons you use to access online Help about Personnel Manager and, for supported users, the Employers' Guide to HR at www.vizual.co.uk/employers-guide.asp.



Button	Menu Access	Description	Procedure	Shortcut
	Help menu> Contents	View Contents for online Help		
	Help menu> Employers' Guide to HR	View the Employers' Guide to HR		

Database Toolbar

The Database toolbar has buttons you use to open and close databases.

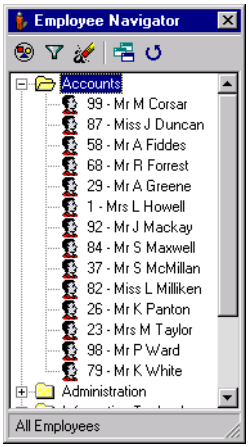
Button	Menu Access	Description	Procedure	Shortcut
Open	File menu> Open Database	Open an existing database	"Opening a Database" on page 126	
Close	File menu> Close Database	Close the current database	"Closing the Current Database" on page 126	

The Employee Navigator

Use the Employee Navigator to locate the employees whose records you want to work with.

Similar to using Windows Explorer, you use Personnel Director's Employee Navigator to organise employee records. Unless you specify otherwise, the Employee Navigator organises your employees by departments.

Double-click the department's folder to display its employees. For example, double-clicking the Accounts folder displays all of the employees in the Accounts department.


Employee Navigator
Accounts
99 - Mr M Corsar
87 - Miss J Duncan
58 - Mr A Fiddes
68 - Mr R Forrest
29 - Mr A Greene
1 - Mrs L Howell
92 - Mr J Mackay
84 - Mr S Maxwell
37 - Mr S McMillan
82 - Miss L Milliken
26 - Mr K Panton
23 - Mrs M Taylor
98 - Mr P Ward
79 - Mr K White
Administration
All Employees

To display an employee's details, you simply double-click the name of the employee.

If grouping by department is inconvenient, you can quickly change the organisation of the Employee Navigator to categorise employees by surname, division, payroll or other criteria. You can even create and select from your own customised groups and filters. You can also locate employees by employee number or name. For further information, see "Searching for Employees" on page 154.

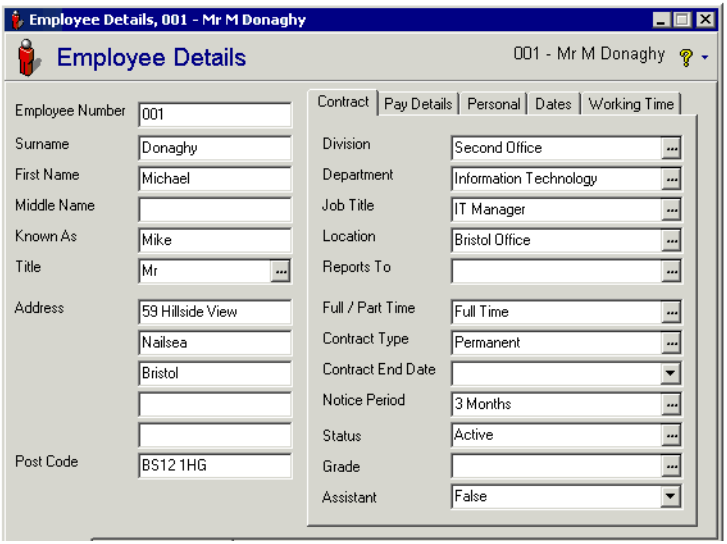
To display details for an employee

1. If the Employee Navigator is not displayed, do one of the following:
   - On the Tools toolbar, click the Employee Navigator button.

     – or –

   - Click the Employee Navigator item in the View menu.
2. Double-click the folder of the department (or other group) that the employee is a member of.
3. Double-click the name of the employee you want to work with.

The Employee Details screen for the employee you selected appears.



4. When you are finished with this employee's record, return to the Employee Navigator to select the next employee.

To refresh data

Use the Refresh button if other users are adding and deleting employee records to ensure that the Employee Navigator shows the latest changes.

- To refresh the data, click the Refresh button.

Shortcut Bar

Use the Shortcut bar on the left side of the main window to open the same screens available from Open Screen on the Screen menu. Each button contains an image and a description related to that screen's function. For example, some coins and notes represent the Pay History screen.

The Shortcut bar has the following buttons, which are grouped according to the type of employee records. You can move screens from one section of the shortcut bar to another by dragging and dropping the screen icon.

Employee Shortcut Bar Buttons

To access employee records, click Employee.

Employee Details

Emergency Contacts

Employee Notes

Vehicle Usage

Correspondence History

Employee Photographs

Employee Images

Absence and Payroll Shortcut Bar Buttons

To access absence and payroll records, click Absence and Payroll.

Holiday and Absence

Absence Allowance

Pay History

Bank Details

Project Time Sheets

Maternity

Benefits

Employment Shortcut Bar Buttons

To access employment records, click Employment .

Career History

Accident History

Medical History

Appraisal History

Disciplinary and Grievance

Exit Interviews

Employment History

Training and Education Shortcut Bar Buttons

To access training and education records, click Training and Education.

Training History

CPE/CPD Record

Professional Membership

Qualifications

Skills

Education History

Common Features of Personnel Director

This section describes some of the features that are available on most of the screens throughout Personnel Director. It provides instructions on how to use these features.

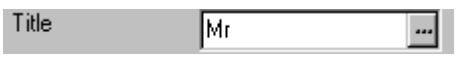
Pick Lists

Pick Lists are used to ensure that information is consistent throughout the database, as well as to save keying-in time.

It is important that the quality of information entered into Personnel Director is consistent. For example, if you are entering the ethnic group “Asian” in the ethnic origin field, you could misspell Asian as “Asean” and “Asain” on different occasions when entering details of staff members in that group. If you printed an ethnic origin report with such variations, it would show three different ethnic groups: Asian, Asean and Asain, instead of one, Asian.

However, by using Pick Lists, you can pre-determine the options that can be entered into certain fields. In the example above, “Asian” would be entered once on the Pick List. Every time you want to specify this ethnic group for an employee, you simply select this option from the Pick List. This ensures that reports you print will be accurate.

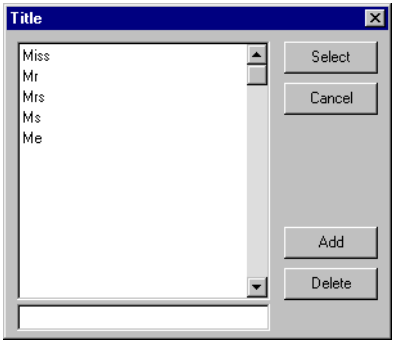
Fields that have Pick Lists have a Pick List selection button displayed just to the right of the field. For example, this is the Title field on the Employee Details screen:



In addition to the Pick Lists to which you can add information, there are fixed pick lists that are indicated by a standard selection button. You can only add information to these lists if you use the Screen Designer to customise the screen. The Gender field on the Employee Details screen is an example of a fixed Pick List.

Displaying a Pick List

- Click the Pick List button to the right of a field or click in the pick list field and press F4.
- The Pick List for that field is displayed.



Selecting Items from Pick Lists

To select an item from a Pick List, do either of the following.

- Double-click the item.

  – or –

- Select the item and click the Select button.

  To cancel the selection, click the Cancel button.

Tip: *To move quickly to a particular item in the pick list, type the first letter. This function is case sensitive, so pressing "s" moves you to entries starting with lowercase S and pressing "S" moves you to entries starting with uppercase S.*

Adding Items to a Pick List

1. Click the Pick List button to the right of the field where you want to add an item to the Pick List. The Pick List for that field is displayed.
2. Type text in the field at the bottom of the list, then click the Add button or press Enter.
3. Click the Select button to add the item or the Cancel button to cancel it.

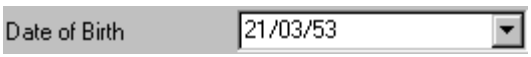
   The newly entered item now appears as an option on the Pick List.

Removing Items from a Pick List

1. Click the Pick List button to the right of the field where you want to remove an item on the Pick List. The Pick List for that field is displayed.
2. Use the mouse to highlight the item you want to remove.
3. Click the Delete button.

Calendar Buttons

Calendar buttons are used to quickly enter correctly formatted dates into date fields. Clicking a Calendar button displays a calendar pop-up window, from which you select the date you want to enter. This function is found where you see a selection button to the right of the date field, for example:

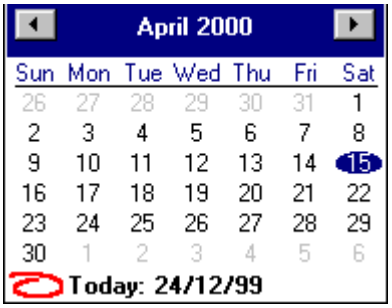


Personnel Director is fully year 2000 compliant and supports Date Windows. For more information about Date Windows, see “Setting the Date Format Used by Windows” on page 59.

Entering Dates

Tip: *You can also enter dates by just typing the numbers into the date field, using the date format that has been set up for your system. Your date format is defined in “Setting the Date Format Used by Windows” on page 59.*

1. Click the Calendar button to the right of a date field. The calendar is displayed.



2. Select the month and year as follows.
   - Click the left and right arrows to move to a previous or next month or year

     -or-
   - Click the month or year text on the calendar title bar and select the desired month or year from the drop-down list. This is quicker if you want to change the date by several months or years.
3. Click the date you want to enter.
   - To close the calendar without selecting a date, click outside the calendar.

Calculator Buttons

Calculator buttons are used to quickly enter numeric values and formatted currency amounts into currency fields. Clicking a Calculator button displays a pop-up calculator you can use to calculate an amount. This function is found where you see a Calculator button to the right of a numeric or currency field, for example:

Entering Currency Amounts

1. Click the Calculator button to the right of a currency field. The calculator is displayed.

2. Calculate amounts as follows:
   - Enter the first number in the calculation.
   - Click + to add, - to subtract, * to multiply, or / to divide.
   - Enter the next number in the calculation.
   - Click =.

Field Labels

Field labels appear to the left of each field and describe the data to be entered into that field. If you prefer to use other terminology to describe a field, you can customise the appearance of your screens by changing the field labels. For more information about changing field labels, see “Changing an Existing Screen” on page 549.

Calculated Fields

Fields that appear in yellow are calculated fields. You cannot enter data into these fields.

The following example shows the Cost calculated field on the Holiday and Absence details screen. The cost is calculated automatically as follows:

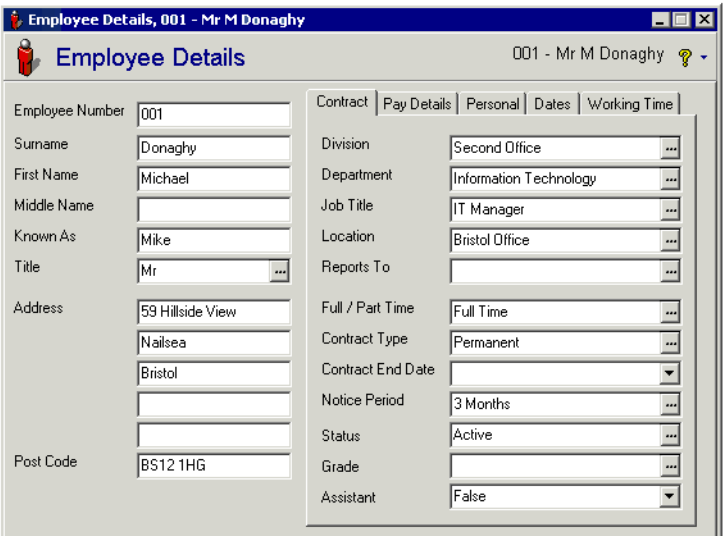
Cost of employee per day (from employee's current pay record)
x days lost

Employee Screens

There is a main screen that displays general information about an employee called the Employee Details screen. In addition, there are other secondary screens which contain additional details, such as pay history, qualifications, and emergency contacts.

About the Employee Details Screen

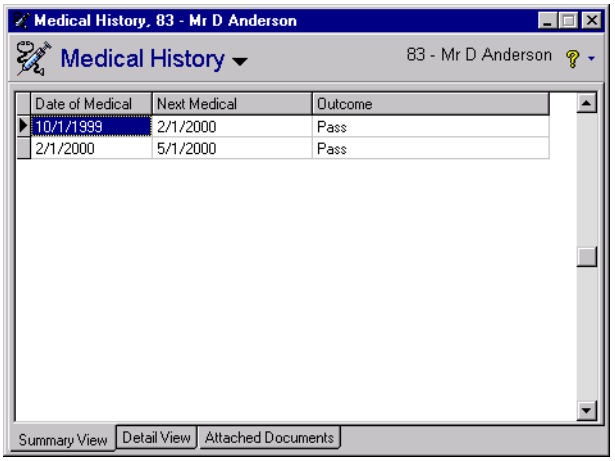
The main employee screen is the Employee Details screen.



It contains general information about an employee including their employee number, name and address as well as contact, pay details, personal, dates and working time particulars. This screen is the starting point for accessing all of the information about an employee in Personnel Director. For more information about the Employee Details screen, see chapter 7 "Working with Employee Records" on page 149.

About Other Employee Screens

There are additional employee screens that contain various types of employee data, such as Holiday and Absence History, Pay History or Medical History. These screens present data associated with the subject that pertains to the currently selected employee. For more information about these screens, see chapter 9 “Working with Employee Data” on page 189.



Using the Header Band

At the top of the screen the header band displays the name of the current employee screen, together with the name of the current employee.

You can also select many of the other employee screens by clicking ▼ in the Header band to drop-down the screen list. If the ▼ does not appear in the Header band, you cannot switch screens from that location.

Changing the Views

Most employee screens have three tabs that you use to view or enter information and attach documents related to the selected record type:

Summary tab. Use the Summary page to view a listing of all records of a specific type for the currently selected employee.

Detail tab. Use the Detail page to enter and edit employee record information for the selected data type.

Attached Documents tab. Use the Attached Documents page to attach electronic documents related to the employee and data category. You cannot attach documents to a single record; documents are linked to all records of that data type for the current employee.

To change from Summary to Detail view:

- Click the Detail tab.

To view attached documents:

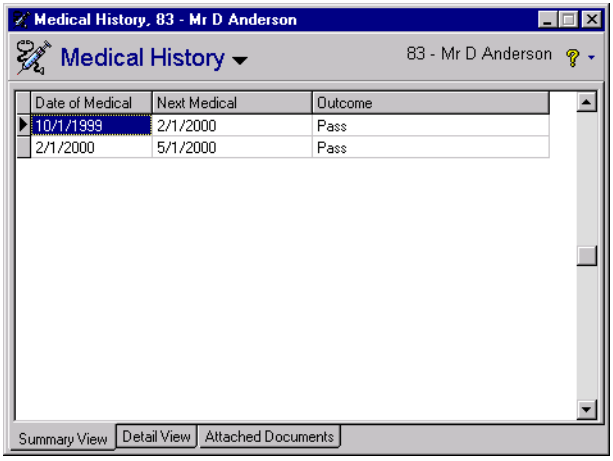
- Click the Attached documents tab.

To change from Detail to Summary view:

- Click the Summary tab.

Summary Screens

Summary screens summarise the employee data into a list view. Each row in the list represents one employee record for the type of data contained on the screen. In the following Medical History screen, each row displays a holiday or absence record for the current employee.



Sorting Columns

You can sort the records using any displayed column. Simply click the column heading of the field by which you want to sort. Clicking the column heading again will sort the records in the opposite order. For example, the medical date is used to sort the records from the oldest date to the newest date. To sort the records from the latest date to the earliest date, click the Date of Medical column heading.

Rearranging the Columns

You can change the order of the columns in the Summary screen by dragging and dropping them to any position you wish. You can also resize columns.

Note: *Column positions and sizes are saved and displayed again the next time you access the screen.*

To rearrange column headings

- Click a column heading.
- Hold down the mouse button, then drag the heading to the desired position and release the mouse button.

To resize column headings

- Click on the vertical line between two columns, and drag until the column is the desired size.

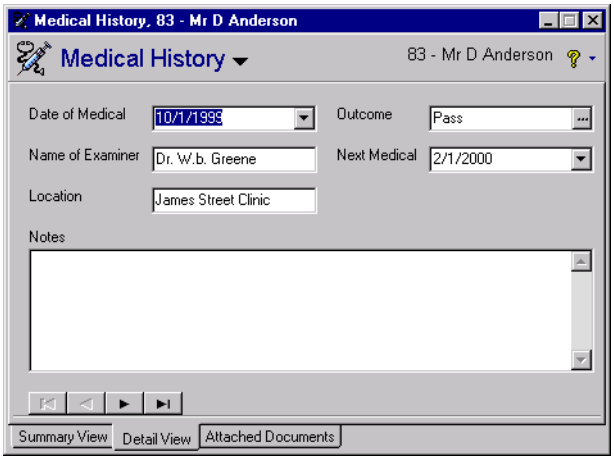
Customising the Column and Row Display

On any Summary screen, you can fix or unfix column position, turn on and off the display of row and column lines, record indicators and notes, and change the grid and font colors.

To	Right-click and select...
Hide or display specific fields	Show Fields. Add, remove, and change the order of fields. Then click OK.
Fix columns so that when you scroll to the right the fixed columns remain visible	Fix Columns
Make column position variable again	Unfix Columns
Display or hide lines between columns	Column Lines
Display or hide lines between rows	Row Lines
Display or hide the record selector symbol in the first column	Record Indicator
Display or hide the contents of the Notes entered on the Details screen	Display Notes
Set the colour for the entire screen	Grid Colour. Select the color for the screen background and click OK.
Set the font colour for text	Font Colour. Select the color for the text and click OK.

Detail Screens

On Detail screens, you can view details of individual employee records.

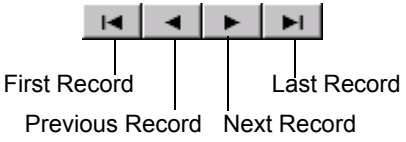


As shown in the screen above, Detail screens contain many of the features described in this chapter, including:

- Tabs for changing the view to Summary or Attached Documents view.
- Pick Lists, Calendar buttons, and calculated fields.

Using the Navigation Buttons

Click the buttons on the navigation bar to view the first, previous, next, and last record associated with this screen.

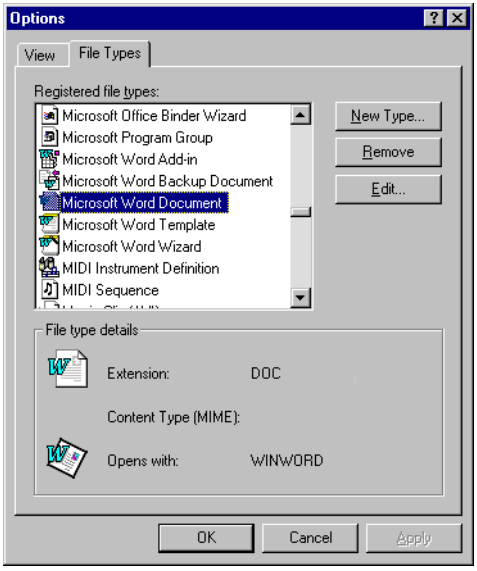


Attached Documents Screens

The Attached Documents screen is used to store documents associated with an employee's personnel record. The document could be a Microsoft Word or WordPerfect document, a spreadsheet, an image or even a sound recording. Attached documents must have an associated program. You can tell if a file has an associated program by double-clicking the file within Windows Explorer. The file should be displayed within the program in which it was created. For example, double-clicking a Microsoft Word document file will start Microsoft Word and load the document.

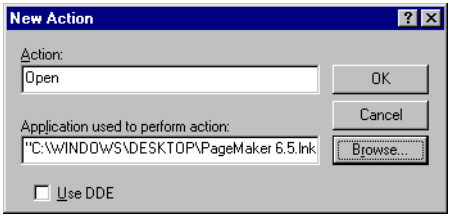
To associate a document that is not already associated with a program

1. In My Computer or Windows Explorer, click the View menu, and then click Folder Options.
2. Click the File Types tab.



3. Click New Type to define a new file type.
   - To modify settings for an existing file type, click the type, and then click Edit.

4. Enter a description of the file type and the file name extension associated with this type of file.
5. Click New to define an action for this file type.

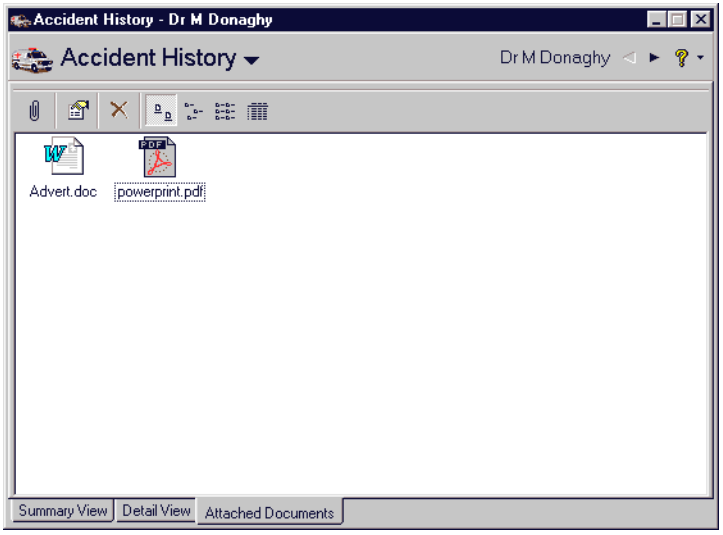


6. Specify Open as the action, then click the Browse button and locate the executable file for the program.

   If you are modifying an existing type, you can click the command in the Action box that you want to modify, and then click Edit.

Displaying the Attached Documents Screen

1. In the Detail View of an employee record, display the record of the employee for whom you wish to display the attached document screen.
2. Click the Attached Documents tab.



Changing the View

Use the following icons to change the view in the Attached Documents screen.

Button	Use To
	Display the attached documents as large icons
	Display the attached documents as small icons
	Display the attached documents as a list of file names
	Display the attached documents as a list of file names and details

Adding an Attached Document

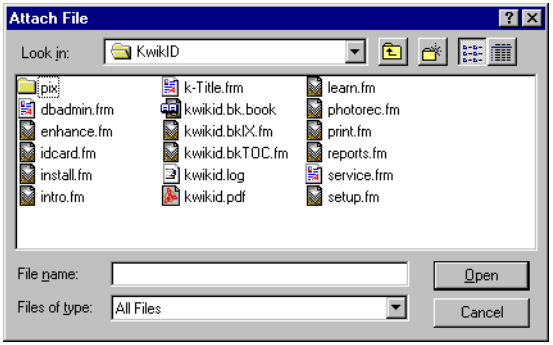
To add an attached document to an employee's record:

1. Take one of the following actions:
   - Drag the document from the Windows Explorer or Desktop onto the Attached Documents list.

     -or-

   - Click the Attach button.

2. The Attach File dialog is displayed:



3. Select the file to attach and click the Open button.

4. To add comments about the attached document, select the document then click the Properties button.

   -or –

   Right click and select Properties.

5. Enter a comment for the document, if you wish.

   Note: *Documents are stored as items in the Personnel Director database. Attached documents are, therefore, backed up when you back up the database.*

Opening an Attached Document

To display an attached document:

1. Highlight the document, then right-click and select Open.

   -or –

2. Double click the document item.

   The document is displayed within the program in which it was created.

Deleting an Attached Document

To delete an attached document:

1. Select the document from the list of attached documents.
2. Right-click and select Delete.

Adding, Updating, Deleting and Printing Employee Records

This section explains how to add, update, delete and print employee records.

Adding New Records

1. Click the New button on the Record toolbar, or press Ctrl+N. The Detail screen enters edit mode. As soon as you start editing a record, the Record toolbar buttons Save and Cancel are activated.
2. Enter the data for the record.
3. Click the Save button to save the record, or the Cancel button to cancel it.

Editing Records

1. Do one of the following:
   - To display Employee Details, locate and double-click the employees' name using the Employee Navigator.
   - To display other employee information, click the appropriate button on the shortcut bar. Then on the Summary screen, double-click the record you want to edit.
2. On the Detail screen, edit the record. The Detail screen enters edit mode. As soon as you start editing a record, the Record toolbar buttons Save and Cancel are activated.
3. Make the required changes to the data, and click the Save button to save your changes, or the Cancel button to cancel them.

Deleting Records

1. Display the Details screen. Do one of the following:
   - To display Employee Details, locate and double-click the employees' name using the Employee Navigator.
   - To display other employee information, click the appropriate button on the shortcut bar. Then on the Summary screen, double-click the record you want to edit.

2. Click the Delete button on the Record toolbar, or press Ctrl+D.

3. Click Yes to confirm that you want to delete the record.

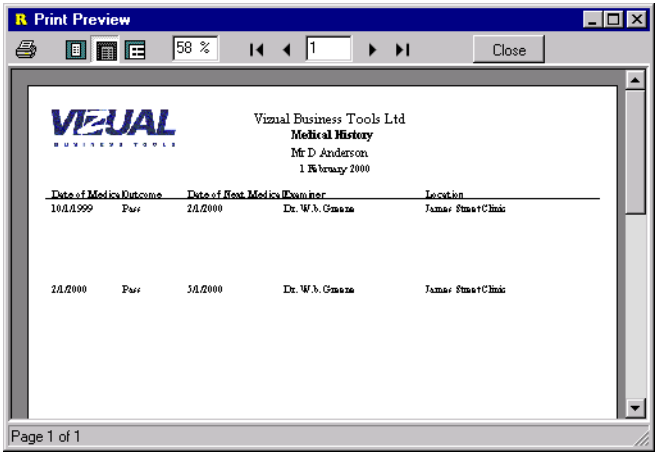
Printing Employee Records

You can print the information on the Employee Details screen as an Employee Record Card. You can also print the information contained on any of the other employee screens

1. Display the Details screen. Do one of the following:
   - To display Employee Details, locate and double-click the employees' name using the Employee Navigator.
   - To display other employee information, click the appropriate button on the shortcut bar. Then on the Summary screen, double-click the record you want to edit.

2. Click the Print button on the Record toolbar.

   When you click the Print button, a screen similar to this Medical History screen print appears:



Use the buttons on the Print Preview screen as follows.

	Print the screen.
	Size the page so that it fits in the Preview window.
	Size the page to fit the width of the Preview window.
	Size the page to display 100% of its actual size.
	Display the first page.
	Display the previous page.
	Display the next page.
	Display the last page.
	Set the zoom magnification.
	Close the Preview window.

Accessing the Employers' Guide to HR

The Employers' Guide to HR is an online resource available to supported users, at www.vizual.co.uk/employers-guide.asp. You can access the Employers' Guide to HR from most parts of Personnel Director.

1. Use one of these ways to display the Employer's Guide to HR:
   - Select the Employers' Guide to HR from the Help menu. Your web browser is launched and the home page of the Employers' Guide to HR is displayed.

     – or –

- Click the HR Guide button on the Help toolbar. A list of topics you can choose from is displayed. Your web browser is launched and the home page of the Employers' Guide to HR is displayed.

  – or –

- Click beside the Help button on any screen and select HR Guide (or press Ctrl+F1). Information relevant to that screen is displayed.

  For example, accessing the Employers' Guide to HR in the Disciplinary and Grievance screen displays information relating to disciplinary action. If there is no relevant topic, the Employers' Guide to HR home page appears.

2. If this is the first time you accessed the guide, you are asked to register as a user.

Exiting Personnel Director

1. Select Exit from the File menu.

   If you made changes to a personnel record and haven't saved them, you are prompted to save these changes.

2. Confirm whether you want to save these changes.

6 WORKING WITH DATABASES

Personnel Director stores employee records in different databases. When Personnel Director is installed, the databases are set up for you. Typically these are:

Personnel Database. The database used to store your company's employee records.

Demonstration Database. A database with a number of sample records which you can refer to at any stage.

Archive Database. Used to store the records of employees that have left the company, but whose details you want to retain for future reference.

Check with your Personnel Director administrator for more information about the databases installed for your use.

You can transfer data from one database to another or to the Archive database. You can export selected Personnel Director data is transferred to a file that can be read by a word processor, spreadsheet, payroll or database program.

Note: *While it is possible to move employee records from one database to another, it is important to note that it is* ***not*** *possible to report on data held across more than one database. It is better to use one database, grouping the records into discrete groups and transferring any leavers to the Archive database.*

Using Databases

You can open and close databases available for your use.

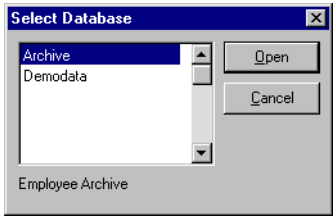
Opening a Database

Use this procedure to open a Personnel Director database. This may be the Demo Database, Archive Database, or a database that was created for you.

Note: *If another database is created on your network and made available to you, the database automatically appears in this list.*

1. On the main screen, select Open Database from the File menu.

   The Select Database screen appears.



2. Select the database that you want to open.
3. Click the Open button to open the database, or the Cancel button to return to the main screen without opening the database.

Closing the Current Database

Use this function before opening a different Personnel Director database.

- To close the current employee database, select Close Database from the File menu.

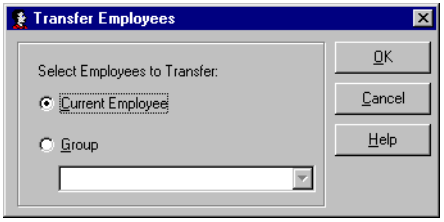
Transferring Employee Records to Another Database

You can transfer an employee's complete record from one database to another. For example, if an employee rejoins the company, you can transfer that employee's records from the Archive Database to the Personnel Database.

Note: *The following rules apply for transferring an employee to another database.*

- *The Employee Number of the employee that you want to transfer cannot be used by an existing employee in the target database.*
- *You cannot transfer an employee if another user is editing any of the employee's details (this only applies for the multi-user edition of Personnel Director).*

1. If you want to transfer an individual employee, make that employee the current record on the main screen, using the Find Record, List Records, or Navigation Control buttons.
2. On the main screen, select Transfer Employees from the Employees menu. The Transfer Employees screen is displayed.



3. Select the employee(s) to transfer.
   - To transfer the current employee on the main screen, click the Current Employee option.
   - To transfer a group of employees, click the Group option and select a group from the drop-down list.
4. Click the OK button to transfer, or the Cancel button to cancel the transfer.
   - If you click the OK button, click Yes to confirm that you want to continue. The list of available databases is displayed.
5. Select the database to which you want to transfer the employee(s).

6. Click the Open button to transfer the employee(s), or the Cancel button to cancel the transfer.

Archiving Employee Records

When you install Personnel Director, an Archive Database is created for you. The Archive Database is used to store personnel files of employees who have left the company. It is good practise to transfer old records to the archive, as this keeps your main database 'clean' and ensures that any reports will only include current employees. You can use the Archive Database like any other database, opening it, browsing it, and reporting on it.

The advantage of transferring leavers records to the Archive is that, in the event that they rejoin the company, their personnel records can just be transferred back to the Personnel Database. In this way, all of their history can be retained without the need to re-enter any data.

You can archive individual employees or groups of employees, or archive employees whose date of leaving is on or before a date that you specify.

Archiving Individuals or a Group of Employees

1. If you want to archive an individual employee, make that employee the current record on the main screen, using the Find Record, List Records or Navigation Control buttons.
2. On the main screen, select Archive Employees from the Employees menu. The Archive Employees screen is displayed.

3. Select the employee(s) to archive.
   - To archive the current employee on the main screen, click the Current Employee option.

- To archive a group of employees, click the Group option and select a group from the drop-down list.

4. Click the OK button to transfer the employees to the archive, or the Cancel button to cancel the transfer.
   - If you click the OK button, confirm that you want to continue.

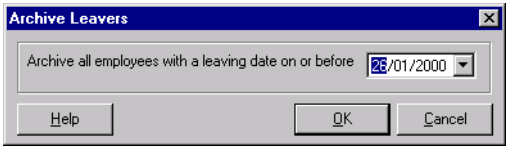
You can view the archived employees at any time by opening the Archive Database (using Open Database on the File menu).

Archiving Employees Based on Date of Leaving

If an employee has left the company or is leaving the company some time in the future, you can set their date of leaving in the Dates of Leaving field on the Dates tab on the Employee Details screen.

Once this date has been set, you can automatically archive these employees using the following steps.

1. Select Archive Leavers from the Employees menu. The Archive Leavers screen is displayed.



2. Enter an archive date. All employees whose date of leaving (as entered in the Date of Leaving field on the Dates tab) is on or before this date will be archived.

3. Click the OK button to transfer the employees to the archive, or the Cancel button to cancel the transfer.
   - If you click the OK button, confirm that you want to continue.

You can view the archived employees at any time by opening the Archive Database (using Open Database on the File menu).

Exporting Data

You can export selected Personnel Director data is transferred to a file that can be read by a word processor, spreadsheet, payroll or database program.

To export data, you can create a database query and export the resulting records to disk, create a report and save it to disk, or export records to the Personnel Director spreadsheet or Microsoft Excel. The best way to export data is to export the result of a query, as described in "Running a Query for Display or Selection" on page 376.

> ***Note:*** *Be sure to indicate which spreadsheet program you want to use. For instructions, see "Setting Your Add-On Preferences" on page 84.*

Exporting employee data is the reverse process of importing data. You select the data you want to export, and save it in a file, which can then be read by a word processor, spreadsheet, payroll, or accounts program.

Export the data using one of the following options:

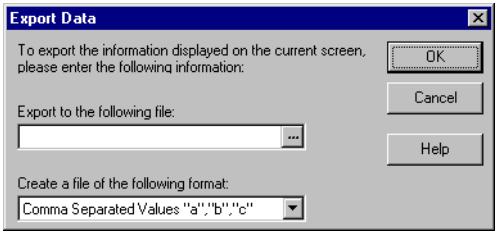
- Export the data directly into a basic text file.
- Export the date using the Personnel Director Spreadsheet to modify the data before exporting it to a spreadsheet or HTML format or text format
- Export the data directly into Microsoft Excel.

  Note: *Be sure to indicate that you want to use Microsoft Excel as the spreadsheet program. For instructions, see "Setting Your Add-On Preferences" on page 84.*
- Export the data from a Personnel Director report (one supplied by Personnel Director or one you previously customised).

Exporting Data to a Text File

1. Display the Personnel Director screen that contains the data you want to export.
2. Click the Export button on the Personnel Director Records toolbar. Then click the down arrow on the right side of the button and select Export to File from the drop-down menu.

   The Export Data screen appears.


Export Data
To export the information displayed on the current screen, please enter the following information:
OK
Cancel
Export to the following file:
Help
Create a file of the following format:
Comma Separated Values "a","b","c"

3. Provide the following information:

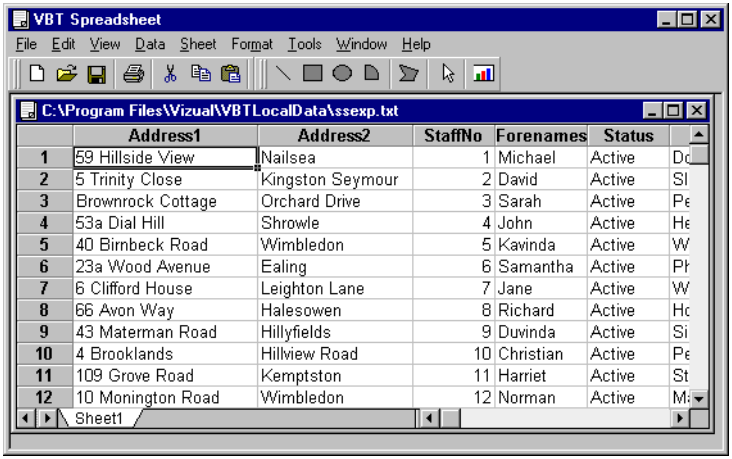
   Export to the Following File: Click the Pick List to specify the location and name of the file that is to contain the data. Then click the Save button.

   Create a file of the following format: Select one of the following formats from the drop-down list: Comma Separated Values (each field is separated from the next by a comma) or Tab Separated Values (each field is separated from the next by a tab).
4. Click the OK button.

Exporting Data Using the Personnel Director Spreadsheet

1. Display the Personnel Director screen that contains the data you want to export.
2. Click the Export button on the Personnel Director Records toolbar. Then click the down arrow on the right side of the button and select Export To Spreadsheet from the drop-down menu.

The VBT Spreadsheet appears.



	Address1	Address2	StaffNo	Forenames	Status	
1	59 Hillside View	Nailsea	1	Michael	Active	Dc
2	5 Trinity Close	Kingston Seymour	2	David	Active	Sl
3	Brownrock Cottage	Orchard Drive	3	Sarah	Active	Pe
4	53a Dial Hill	Shrowle	4	John	Active	He
5	40 Birnbeck Road	Wimbledon	5	Kavinda	Active	W
6	23a Wood Avenue	Ealing	6	Samantha	Active	Pł
7	6 Clifford House	Leighton Lane	7	Jane	Active	W
8	66 Avon Way	Halesowen	8	Richard	Active	Hc
9	43 Materman Road	Hillyfields	9	Duvinda	Active	Si
10	4 Brooklands	Hillview Road	10	Christian	Active	Pe
11	109 Grove Road	Kemptston	11	Harriet	Active	St
12	10 Monington Road	Wimbledon	12	Norman	Active	Mi

3. Use the VBT functions to modify the spreadsheet as desired.

   For more complete instructions, see the Personnel Director Spreadsheet online help.

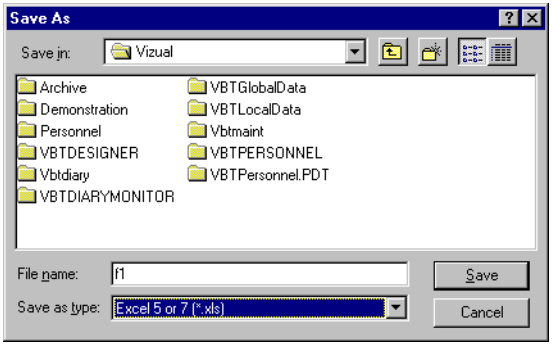
4. To print the spreadsheet, click the Print button or select Print from the File menu.

5. To save the file as a.TXT file, click the Save button or select Save from the File menu. The file is saved, by default, into the folder and file, c:\Program Files\PersDir\VBTLocalData\PMexport.txt

6. To save the file into a different location or to convert the data into a different format, select Save As from the File menu.

   - Select the location, type the filename, and select the file type.

- Choose from one of the following file types: Formula One or 2.x; Excel 4, 5 or 7; Tabbed Text or Tabbed Text Values Only; or HTML or HTML Data Only.



- Click the Save button.

More About Personnel Director Spreadsheet

Working with the Spreadsheet File

To open an existing spreadsheet:

1. Select Open from the File menu.
2. Select the path and filename.
3. Click the Open button.

To create a new spreadsheet:

- Select New from the File menu.

To save a spreadsheet:

- Select Save from the File menu.

  The file is saved, by default, into the folder and file, c:\Program Files\PersDir\VBTLocalData\PMexport.txt

To save the spreadsheet in a different format:

1. Select Save As from the File menu.

2. Select the location, type the filename and select the file type. Choose from one of the following file types: Formula One or 2.x; Excel 4, 5 or 7; Tabbed Text or Tabbed Text Values Only; or, HTML or HTML Data Only.
3. Click the Save button.

To add another sheet to the file:

- Select Insert Sheet from the Sheet menu.

To remove a sheet from the file:

1. Click the tab of the sheet to be deleted.
2. Select Delete Sheet from the Sheet menu.
3. Confirm the deletion. Click Yes.

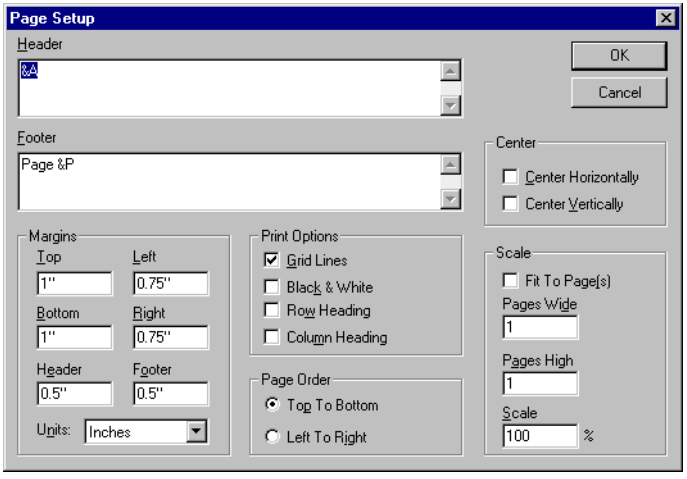
To print a spreadsheet:

1. Select Print from the File menu.
2. Indicate the number of copies and other options.
3. Click Ok.

To set up the spreadsheet page layout:

1. Select Page Setup from the File menu.

   The Page Setup screen appears.



Provide the following information where required:

Header: Type the text to appear at the top of each page.

Footer: Type the text to appear at the bottom of each page.

Use the following codes to control the format of the header or footer.

&L	Left-aligns the characters that follow.
&C	Centers the characters that follow.
&R	Right-aligns the characters that follow.
&D	Prints the current date.
&T	Prints the current time.
&F	Prints the workbook name.
&A	Prints the worksheet name.
&P	Prints the page number.
&P+number	Prints the page number plus number.
&P-number	Prints the page number minus number.
&&	Prints an ampersand.
&N	Prints the total number of pages in the document.

The following font codes must appear before other codes and text or they are ignored. The alignment codes (for example, &L, &C, and &R) restart each section; new font codes can be specified after an alignment code.

&B	Use a bold font.
&I	Use an italic font.
&U	Underline the header.
&S	Strikeout the header.
&O	Ignored.
&H	Ignored.
&"fontname"	Use the specified font.
&nn	Use the specified font size - must be a two digit number.

Center: Specify the page centering options.

- Click the Center Horizontally checkbox to center the spreadsheet between the left and the right edges of the printed page.
- Click the Center Vertically checkbox to center the spreadsheet between the top and bottom edges of the printed page.

Margins: Type the measurements for the margins, header and footer. Select the measurement units from the Units drop-down list.

Print Options: Click the appropriate checkbox to control the following print options:

- Click the Grid Lines checkbox to print the spreadsheet's grid.
- Click the Black & White checkbox to convert all colours to black and remove patterns when printing.
- Click the Column checkbox to print column headings. Clear the checkbox to remove column headings when printing.
- Click the Row checkbox to print row headings. Clear the checkbox to remove column headings when printing.

Page Order: Indicate how the spreadsheet workbook is to be printed.

- To print pages in the spreadsheet workbook from top to bottom before printing left to right, select the Top to Bottom option.
- To print pages in the spreadsheet workbook from left to right before printing top to bottom, select the Left to Right option.

Scale: Indicate how the spreadsheet workbook is to be scaled.

- Click the Fit To Pages checkbox to compress the spreadsheet workbook onto the number of pages that you specify.
- Type the number of pages high and wide you want to be printed.
- Specify the percentage to scale the spreadsheet.

To create a graph:

1. Select the rows(s) or column(s) to be used in the graph.
2. Click the Graph button or select Graph from the Tools menu.
3. Create an area in which to display the graph by dragging the mouse.

To delete the graph:

- Select the graph object, and click the Delete button or press Del.

To set non-scrolling (fixed) rows or columns:

1. Select the rows(s) or column(s) to be set.

   The worksheet splits into panes: ones that are scrollable and ones that are not (frozen or fixed).

2. To set the area:
   - To freeze rows, select Fix Rows from the Sheet menu.
   - To freeze columns, select Fix Columns from the Sheet menu.
3. To remove the setting:
   - To freeze rows, select Unfix Rows from the Sheet menu.
   - To freeze columns, select Unfix Columns from the Sheet menu.

Editing Spreadsheet Data

To clear, copy, cut, and paste cells:

Clear	Clears the Spreadsheet clipboard.
Copy	Copies the current selection to the Spreadsheet clipboard and the Windows clipboard (in text format only). If there is more than one selection, only the first selection is copied.
Cut	Cuts the current selection to the Spreadsheet clipboard. If there is more than one selection, only the first selection is cut.
Paste	Pastes the contents of the Spreadsheet clipboard to the current selection. If the Spreadsheet clipboard is empty, text is pasted from the Windows clipboard. You can also paste tab-delimited blocks of data.

To insert a row:

1. Select the row before which the new row is to be inserted.
2. From the Edit menu, select Insert.

To delete a row:

1. Select the row to be deleted.
2. From the Edit menu, select Delete Row.

To delete a column:

1. Select the column to be deleted.
2. From the Edit menu, select Delete Column.

To find text or a value:

1. From the Edit menu, select Find or press Ctrl+F.
2. Provide the following information:

   Find What: Type the partial word, word phase, or value you are looking for.

   Search: Select how the search is to be performed: row by row or column by column.

   Look In: Indicate where the search is to be performed: in formulas or in Values

   Match Case: Click this checkbox to locate only those occurrences with upper and lower case characters as specified in Find What.

   Find Entire Cels Only: Click this checkbox to locate only those occurrences that exactly match what you specified in Find What.
3. Take one of the following actions:
   - To locate the next occurrence, click the Find Next button.
   - To replace with different text or value, click the Replace button.

To replace text or a value:

1. From the Edit menu, select Replace.
2. Provide the following information:

   Find What: Type the partial word, word, phase, or value you are looking for.

   Replace With: Type the partial word, word phase, or value to replace the occurrence.

Search: Select how the search is to be performed: row by row or column by column.

Match Case: Click this checkbox to locate only those occurrences with upper and lower case characters as specified in Find What.

Find Entire Cels Only: Click this checkbox to locate only those occurrences that exactly match what you specified in Find What.

3. Take one of the following actions:
   - To find the next occurrence, click the Find Next button.
   - To replace the selected occurrence, click the Replace button.
   - To replace all occurrences, click the Replace All button.

Hiding/Showing Toolbars

To hide or show the main toolbar:

- From the View menu, select Main Toolbar. A checkmark indicates that toolbar is to show.

To hide or show the drawing toolbar:

- From the View menu, select Drawing Toolbar. A checkmark indicates that toolbar is to show.

Formatting Data

To set the alignment of selected cells:

1. Select the cell(s) to be formatted.
2. Select Alignment from the Format menu.
3. Provide the following information:

   Horizontal: Select the type of horizontal alignment from the drop-down list.

   Vertical: Select the type of vertical alignment from the drop-down list.

   Wrap Text: Click this checkbox so that if the content exceeds the width of the cell, it continues on the next line.
4. Click OK.

To set the font for selected cells:

1. Select the cell(s) to be formatted.
2. Select Font from the Format menu.
3. Provide the following information:

   Font: Select the font to be used from list.

   Font Style: Select the style of font from the list.

   Size: Select the size of font from the list.

   Effects

   Strikeout: Click this checkbox if a horizontal line (strikeout) is to appear in each character.

   Underline: Click this checkbox if each character is to be underlined.

   Color: Select the colour from the drop-down list.

   Script: Select the type of script from the drop-down list.
4. Click OK.

To set the font for the entire worksheet:

1. From the Tools menu, select Options>Default Font.
2. Provide the following information:

   Font: Select the font to be used from list.

   Font Style: Select the style of font from the list.

   Size: Select the size of font from the list.

   Effects

   Strikeout: Click this checkbox if a horizontal line (strikeout) is to appear in each character.

   Underline: Click this checkbox if each character is to be underlined.

   Color: Select the colour from the drop-down list.

   Script: Select the type of script from the drop-down list.
3. Click OK.

To set the border for selected cells:

1. Select the cell(s) to be formatted.
2. Select Border from the Format menu.
3. Provide the following information:

   Line Style: Click the button representing the line style you want to use.

   Color: Click the colour of the border.

   Border: Click the button representing the border you want to use.

   A example of the border appears in the sample box.
4. Click OK.

To set the colour palette for the entire worksheet:

1. From the Tools menu, select Options>Set Color Palette.
2. Do one of the following:
   - To replace a colour in the palette, select the color and click the Edit button. Click the colour matrix or type the values for the Hue, Saturation, Luminosity, Red, Green and Blue, then click the Add To Custom Colors button.
   - To return to the default colour, select the customised colour then click the Default Color button.
   - To return to the default colour palette, click the Default Palette button.
3. Click OK.

To set the pattern for selected cells:

1. Select the cell(s) to be formatted.
2. Select Pattern from the Format menu.
3. Provide the following information:

   Fill Colour: Click the fill color you want.

   Pattern Colour: Click the pattern colour you want.

   Fill Pattern: Click the fill pattern you want.
4. Click OK.

To set protection for selected cells:

1. Select the cell(s) to be formatted.
2. Select Cell Protection from the Format menu.
3. Provide the following information:

   Locked: Click this checkbox if the contents of this cell are to be displayed, but are not to be edited. Clear this checkbox if the contents are to be updatable.

   Hidden: Click this checkbox if the contents of this cell are not to be displayed. Clear this checkbox to display the contents.
4. Click OK.

To set column width:

1. Select the columns to be formatted.
2. Select Column Width from the Format menu.
3. Provide the following information:

   Width: To specify the width, type the number of units.

   Use Default: To use the default width, click this checkbox. To set the default, click the Change Default button, and type the width and units, then click OK.

   Units: Select the units of measurement from the drop-down list.
4. Click OK.

To set row height:

1. Select the rows to be formatted.
2. Select Row Height from the Format menu.
3. Provide the following information:

   Height

   Auto: Click this radio button if you want the height to be adjusted automatically.

   Custom: Click this radio button if you to specify the height. Then type the value for the height in the box.

Use Default: To use the default height, click this checkbox. To set the default, click the Change Default button, and select or specify the height, select the units, then click OK.

Units: Select the units of measurement from the drop-down list.

4. Click OK.

To set the format of selected cells:

1. Select the cells to be formatted.
2. Select Cell Format from the Format menu.
3. Select the format for the cell contents from the drop-down list.
4. Do one of the following:
   - To set a customised format, click the Custom Number button. Type the format and click OK.
   - To set the format, click OK.

To set a validation rule for selected cells:

1. Select the cells where the rule is to be applied.
2. Select Validation Rule from the Format menu.
3. Provide the following information:

   Rule: Type the rule to be applied.

   Text: Type the text to be displayed if the rule is broken.
4. Click OK.

Working with Spreadsheet Data

To define a name for a formula, a value, or selected cells:

1. If you are naming a cell or range of cells, select the cell(s).
2. From the Data menu, select Define Name.
3. Provide the following information:

   Name: Type the name. The name cannot include blanks (spaces).

   Use names to identify a cell, a group of cells, a value, or a formula. For example, the formula "= Sales - Expenses" is much clearer than "=A10 - A6".

   You can also use names to identify constants and formula expressions. For example, you might define the name LightSpeed as 186000. You could then use the name LightSpeed in all your formulas. Or, you could define the name SqRtTwo as the formula SQRT(2).

   Formula: The cell or range reference that represents your selection (step 1) is displayed. You can edit this reference, if desired.
4. Click the Add button.

To remove a name for a formula, a value, or selected cells:

1. From the Data menu, select Define Name.
2. Select the name to be deleted.
3. Click the Delete button.

To sort data:

1. Select the range of cells to be sorted (a row, a column, or multiple rows or columns).
2. From the Data menu, select Sort.
3. Provide the following information:

   Sort By: Indicate the method to be used: sort by rows, or sort by columns.

   Keys: If you are sorting multiple columns (or rows), indicate the order in which the columns (rows) are to be sorted as well as the sort sequence. You assign each a key to indicate the order (Key 1, Key 2, etc.).

If the data is sorted by rows, each row of data in the specified range is considered a record and sorted together. If data is sorted by columns, each column in the specified range is considered a record.

When defining sort keys, specify the number of the row or column in the selected range that is to serve as a key.

Select the key and specify the following:

Key Reference: Type the column (row) identification.

Ascending: Click this if you want the lowest number (or first letter or first date) to appear first.

Descending: Click this if you want the highest number (or last letter or last date) to appear first.

4. Click OK.

To create an autofill list.

1. From the Data menu, select Autofill List:
2. Type the new autofill list, separating each item with a semi-colon.

   You can also edit default lists using the Current List text box.
3. Click the Add button.

To delete an autofill list:

1. From the Data menu, select Autofill List.
2. Select the list and click the Delete button.

To automatically fill cells:

1. Select the cells to be filled.
2. Type the first item.
3. Do one of the following:
   - To enter cell by cell, press Tab.
   - To enter the entire row (column), press Enter.

To recalculate the values in the spreadsheet:

- From the Tools menu select Recalc, or press F9.

To set recalculation options:

1. From the Tools menu, select Options>Calculations.
2. Provide the following information:

   Automatic Recalc: Click this checkbox to immediately recalculate the worksheet if recalculation is necessary. Thereafter, any change to the workbook causes all formulas to be recalculated. Clear this checkbox to recalculate the worksheet only if you specifically request a recalculation.

   Iteration: Click this checkbox to limit the number of calculation iterations when a circular reference is detected. The iteration stops when the first of the two following conditions occurs.

   Maximum Iterations: Type the number of iterations to be used as the limit when calculating circular references.

   Maximums Change: Type the maximum change between iterations. The smaller the number the more accurate your answer will be.

   Precision As Displayed:. Click this checkbox to store values based on cell format. Clear this checkbox to store values using full precision.
3. Click OK.

Working with the Spreadsheet Tools

To draw an object:

1. From the Drawing toolbar, click one of the following buttons: line, rectangle, circle, partial circle, or polygon.
2. Click the mouse on the spreadsheet and drag until you get the size you want, then release the mouse button.
3. To change the size, click the object, then drag one of the object's handles (little black square) to the position required.

To delete an object:

- Select the object and click the Cut button (or select Cut from the Edit menu, or press Ctrl+X).

Setting Print Options

To set the print area:

1. Select the range you want to print.
2. From the Sheet menu, select Set Print Area.

To set print titles:

1. Select the row (column) which contains the titles that are printed on each page.

   Row titles are printed at the top of each page; column titles are printed on the left of each page.
2. From the Sheet menu, select Set Print Title.

To set a page break:

1. Select the row where the page break is to be inserted.
2. From the Sheet menu, select Set Page Break.

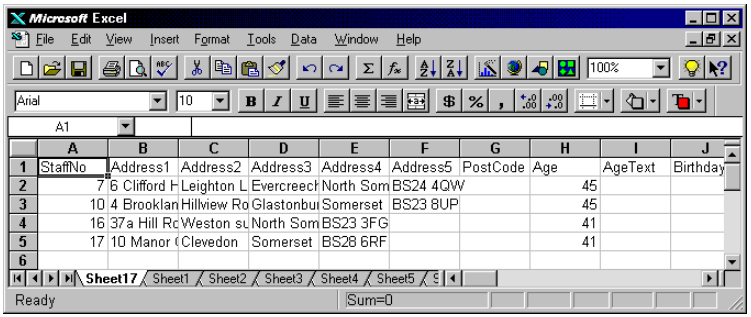
Exporting Data Using Microsoft Excel

Note: *Be sure to indicate that you want to use Microsoft Excel as the spreadsheet program. For instructions, see "Setting Your Add-On Preferences" on page 84.*

1. Display the Personnel Director screen which contains the data you want to export.

2. Click the Export button on the Personnel Director Records toolbar. Then click the down arrow on the right side of the button and select Export to Spreadsheet from the drop-down menu.

   The Excel Spreadsheet appears, displaying the data you requested


Microsoft Excel
File Edit View Insert Format Tools Data Window Help
Arial 10
A1
StaffNo Address1 Address2 Address3 Address4 Address5 PostCode Age AgeText Birthday
7 6 Clifford H Leighton L Evercreech North Som BS24 4QW 45
10 4 Brooklan Hillview Ro Glastonbu Somerset BS23 8UP 45
16 37a Hill Rc Weston su North Som BS23 3FG 41
17 10 Manor (Clevedon Somerset BS28 6RF 41
Sheet17 Sheet1 Sheet2 Sheet3 Sheet4 Sheet5
Ready
Sum=0

3. Use the Excel functions to modify the spreadsheet as desired. For instructions, see the Microsoft Excel documentation.
4. To exit Microsoft Excel, select Exit from the File menu.

7 WORKING WITH EMPLOYEE RECORDS

Overview

This chapter explains how you create and maintain basic employee records. These records contain the employee data that you enter on the Employee Details screen in Personnel Director. This includes the following data:

Employee Detail identification. The employee's number, name and address.

Contract tab. Data relating to the employee's contract with the company.

Pay Details tab. A summary of the employee's current pay, payroll and tax details.

Personal tab. Miscellaneous personal details for the employee.

Dates tab. Key dates relating to the employee.

Working Time tab. Status of participation in Working Time Directive.

After these employee records are created, you can enter many other types of data for these employees (described in "Working with Employee Data" on page 189).

This chapter also describes how you can search the database for particular employee records, and how to sort records in the database.

Creating New Employee Records

There are several ways to create new employee records in Personnel Director:

- Use the New Employee Wizard.
- Enter them manually on the main screen and main screen tabs.
- Import them from another existing database, spreadsheet or payroll program.

The first two of these methods are described below. For information about importing employee records, refer to "Importing Data from Other Sources" on page 443.

Using the New Employee Wizard

Personnel Director provides a Wizard which takes you through the process of creating new employee records.

To use this Wizard:

- Select New Employee Wizard from the Help menu.

  The Wizard guides you through the steps required to create new employee records.

Creating New Records Manually

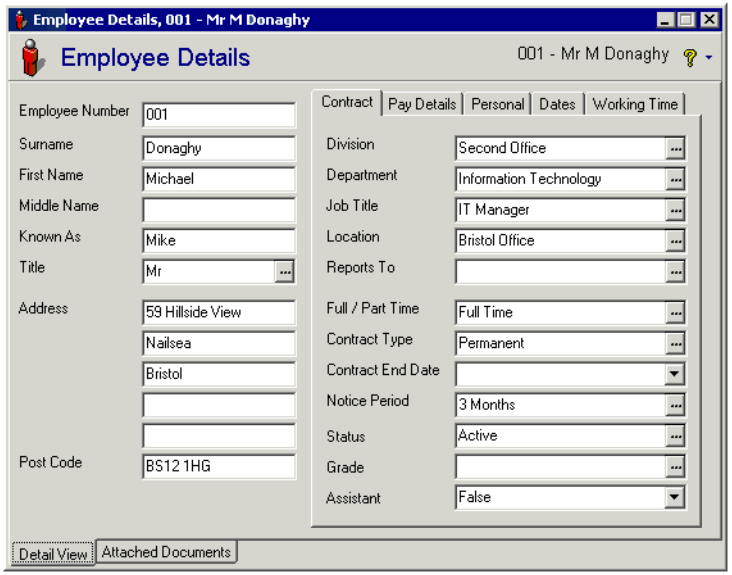
1. Open the database that employee records are to be added to.
   - On the main menu, select Open Database from the File menu.
   - Select the database that you want to add records to, and click the OK button.
2. Display the Employee Details screen.
   - Click the Open Screen button, or select Open Screen from the Screens menu.
   - Select Employee Details
   - Click OK.
3. Do one of the following:

   - On the Record toolbar, click the New button.

     – or –

   - Select New Record from the Screen menu or press Ctrl+N.

A blank record appears in the Detail View tab of the Employee Details screen.



4. First, enter an Employee Number for the new employee. This field is mandatory and must be unique.
5. Press the Tab key on your keyboard to move to the next field. Fill in as much or as little data as you want. Click the Contract, Pay Details, Personal, Dates, and Working Time tabs to enter data in those categories.
   - For details about the data you can enter for an employee, refer to "Employee Data Entered on the Employee Details Screen" on page 159.
   - For details about how to use the data entry features in Personnel Director, refer to "Common Features of Personnel Director" on page 105.

6. When you finish entering data, click the Save button to save your changes, or the Cancel button to cancel any changes that you have made.

   Tip: *The creation of a new record can be used to trigger a Career Event or Diary Reminder. See "Setting Career Event Preferences" on page 80. For more information about automatically triggered diary reminders and headcount statistics created when employees leave or join the company, see page 167.*

Editing Employee Records

Once a record for an employee has been created in Personnel Director, you can enter and edit data for that employee at any time. Use this procedure to edit an existing record.

1. Display the employee record you want to edit on the Detail View tab of the Employee Details screen.
   - To locate an employee record, refer to "Searching for Employees" on page 154.
2. Edit the fields required, as described in "Creating New Records Manually" on page 150.

3. When you finish editing data in the record, click the Save button to save your changes, or the Cancel button to cancel any changes that you have made. The main screen returns to browse mode.

Deleting Employee Records

You can completely remove an employee record from the Personnel Director database using the delete function. When an employee is deleted, archived, or given a date of leaving, Headcount Statistics are maintained. For more information, see "Automatically Generated Headcount Statistics" on page 167.

Note: *In most cases you will not want to delete the record completely, even when an employee leaves the company. Personnel Director comes with an Archive Database. To keep your main database from becoming 'clogged' with old records, move the records of ex-employees into this database. Archived records can be retrieved at any time, in case an ex-employee rejoins the company or a prospective employer of an ex-employee contacts you for a reference. See "Archiving Employee Records" on page 128.*

1. Display the employee record you want to delete on Details View of the Employee Details screen.
   - To locate a particular employee record, refer to "Searching for Employees" on page 154.

2. To delete a record, do either of the following.
   - Select Delete Record from the Screen menu.

     – or –

   - On the Record toolbar, click the Delete button or press Ctrl+D.

   You are prompted to confirm that you want to delete the record.
3. Click the Yes button to delete the record, or the No button to cancel.

Printing Employee Records

You can print an employee record, which contains all of the employee data entered on the Employee Details screen.

1. On the Employee Details screen, do either of the following:
   - Click the Print button on the Record toolbar.

     – or –

   - Select Print Records from the File menu or press Ctrl+P.

   The Print Preview screen is displayed.
2. Click the Print button to print the report.

   For information about how to use the Print Preview screen, see “Printing Employee Records” on page 121.

Searching for Employees

To locate an employee within a database, you can use these methods:

- Locate and select employees using the Employee Navigator.
- Quickly locate specific employees by name or employee number.

Using the Employee Navigator

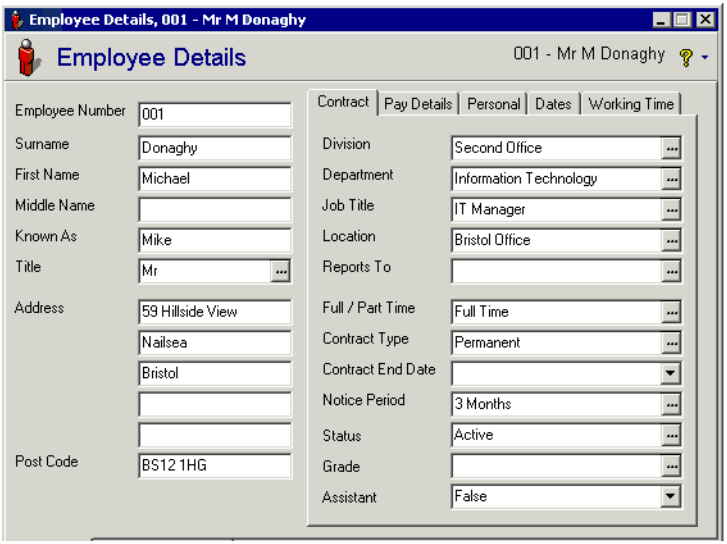
Use the Employee Navigator to locate the records you want to work with.

1. If the Employee Navigator is not displayed, do one of the following:
   - On the Tools toolbar, click the Employee Navigator button.

     – or –

   - Click the Employee Navigator on the View menu.
2. Double-click the folder of the department (or other group) that the employee is a member of.
3. Double-click the name of the employee you want to work with. The Employee Details screen appears for that employee.

   The Employee Details screen for the employee you selected appears.

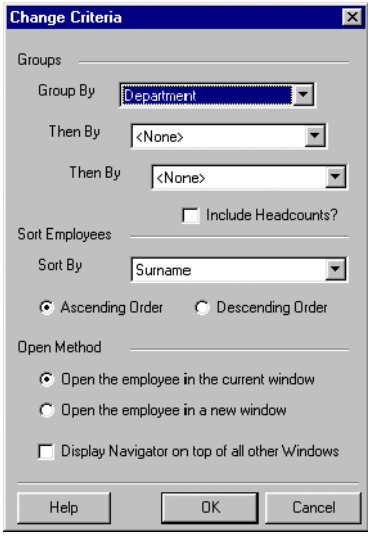


4. When you are finished with this employee's record, return to the Employee Navigator to select the next employee.

To change Employee Navigator grouping criteria

1. Click the Change Criteria button.

   The Change Criteria screen appears.



2. Provide the following information:

   Groups. From the Group By drop-down list, select the criteria you want to use to group employees in the Employee Navigator. If you want additional levels of grouping, select additional criteria from the Then By drop-down list. For example, you can organise the display of employee names using divisions, departments, and surnames.

   Include Headcounts. Select this checkbox to display headcounts in the Employee Navigator.

   Sort Employees. Decide how you want the Employee Navigator to sort employees.

   Sort By. Select the field to be used to sort employees from the drop-down list. For example, you can sort employees by age.

Ascending. Select this option to sort in ascending order (A to Z or 1 to 9).

Descending. Select this option to sort in descending order (Z to A or 9 to 1).

Open Method. Decide how you want the Employee Navigator to work.

Open the Employee In The Current Window. Select this option to replace the contents of the current screen with that of an employee you select from the Employee Navigator. For example, if the Holiday and Absence screen is displayed and you select a different employee from the Employee Navigator, the information in the Holiday and Absence screen is replaced by that of the selected employee.

Open the Employee In A New Window. Select this option to open a new window with the selected employee's information displayed in it.

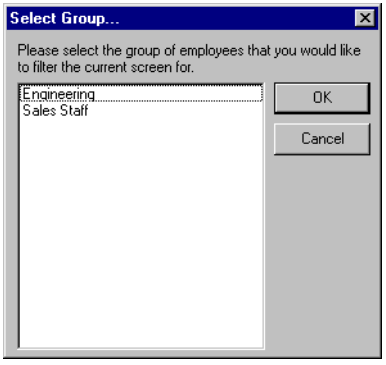
Display Navigator On Top Of All Other Windows. Click this checkbox if you want the Employee Navigator to appear on top of all employee records that you open.

3. Click OK.

To select a custom-made group

1. Click the Group button.

   A list of groups is displayed.



2. Select the group that you want to work with and click the OK button.

You can also create your own group. For further instructions, see chapter 12 “Working with Groups and Filters” on page 285.

The status bar at the bottom of the Employee Navigator displays the name of the current group.

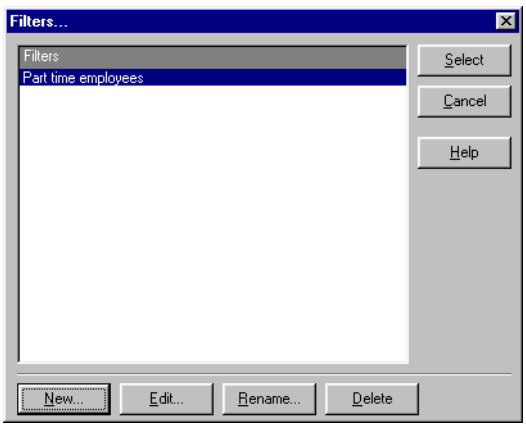
3. Double-click the folder of the group that the employee is a member of.
4. Double-click the name of the employee you want to work with. The Employee Details screen appears for that employee.
5. When you are finished with the employee’s record, return to the Employee Navigator to select the next employee.

***Note**: To remove the current group or filter from the Employee Navigator, click the Remove Group/Filter button.*

To select a filter

1. Click the Filter button on the Employee Navigator.

   The Select Filter screen is displayed.



2. Select the filter you want to run and click the Select button.

   You can also create your own filter. For further instructions, see chapter 16 “Creating Queries” on page 357.

The status bar at the bottom of the Employee Navigator displays the name of the current filter.

3. Double-click the name of the employee you want to work with. The Employee Details screen appears for that employee.
4. When you are finished with the employee's record, return to the Employee Navigator to select the next employee.

***Note**: To remove the current group or filter from the Employee Navigator, click the Remove Group/Filter button.*

To refresh data

Use the Refresh button if other users are adding and deleting employee records to ensure that the Employee Navigator shows the latest changes.

- To refresh the data, click the Refresh button.

Locating Employees by Employee Number or Name

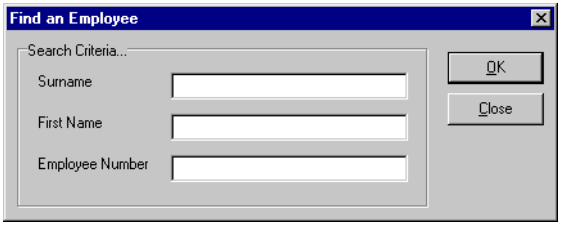
You can quickly find employees by specifying their name or employee number.

1. Do one of the following:
   - On the Tools toolbar, click the Q Find button.

     – or –

   - Select Quick Find from the Employees menu or press Ctrl+Q.

   The Find An Employee dialog is displayed.



2. Enter one or more of the following fields.

   Surname: Enter the employee's last name.

First Name: Enter the employee's first name.

Employee Number: Enter the employee's Employee Number.

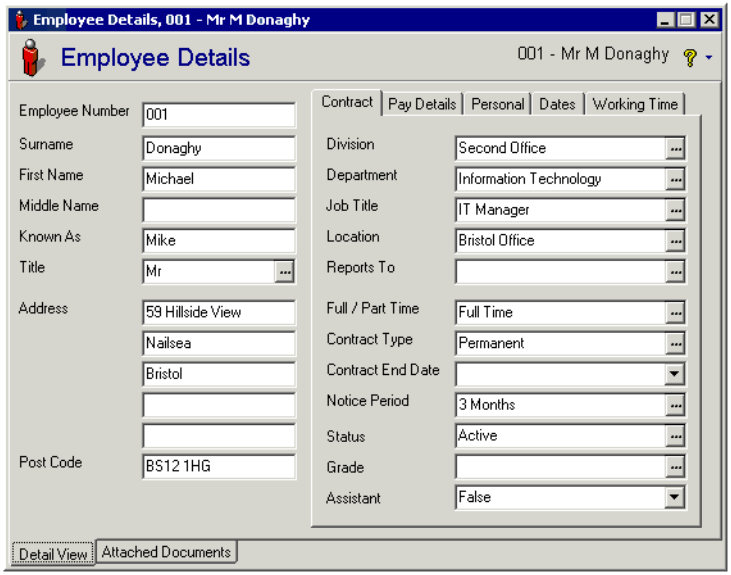
3. Click the OK button to begin the search.

   Personnel Director displays the employee who most closely matches your search.

4. Select the employee whose Employee Details you wish to see and click Select.

Employee Data Entered on the Employee Details Screen

This section describes the data in the fields on the Employee Details screen. The Detail View tab shows the employee number, name and address data on the left side of the main screen and the Contract, Pay Details, Personal, Dates, and Working Time tabs on the right side.



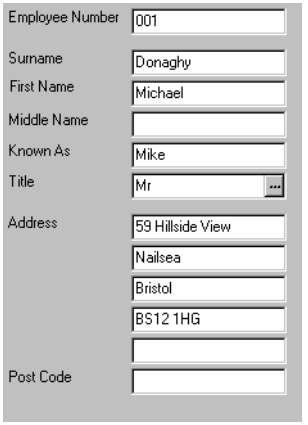
Use this information when you are working with these procedures:

- "Creating New Records Manually" on page 150
- "Editing Employee Records" on page 152.

Main Screen Fields

Tip: *Enter this data in mixed case, as this is how it will appear in letters and reports (for example, Sales Division not SALES DIVISION). You can set the data to display in Mixed Case by editing the Field Properties in the Screen Designer. For more information, see "Changing Screen Properties" on page 550.*

The following employee fields are on the left side of the main screen.



Employee Number: Enter a unique number designated to each employee. You must enter this number, as it is not generated automatically by Personnel Director. It can be a simple number, or a combination of letters and numbers, such as a payroll number.

Surname: The employee's surname, which appears on any letters sent to the employee created in Personnel Director.

First Name: Enter the employee's first name(s), as used in formal correspondence. Note the difference between it and the Known As field.

Middle Name: Enter the employee's middle name(s), as used in formal correspondence.

Known As: Enter the name by which the employee is commonly known in an informal scenario (for example, "Bob" where Robert is the First Name).

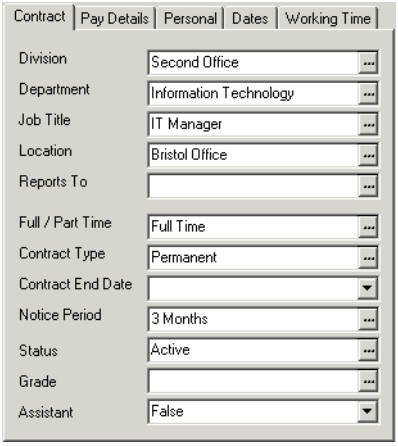
Title: Select the formal prefix to a person's name, such as Ms, Miss, Mrs, Mr, Doctor, and Sir. Use the Pick List button to select or create a new title.

Address: Enter the address of the employee's normal residence. To avoid gaps in the address when performing a mail merge, ensure that no blank lines are left between address lines.

Post Code: Enter the employee's home address post code.

Contract Tab

This tab contains data relating to the employee's contract with the company.



The following employee fields are on the Contract tab.

Division: Select the particular division within the company in which the employee is employed (for example, Manufacturing or South West). These items can defined in and selected from the available Pick List.

When organising the information, it is worth thinking about how you may want to analyse data within the company. Even if you do not have separate divisions, it is useful to utilise the extra layer in the organisation structure so you can have another layer of detail in the reports and charts you prepare.

***Tip:** Changes to the employee's division can be used to define Career Events. See "Setting Career Event Preferences" on page 80.*

Department: Select the particular department within the company in which the employee is employed. Use the Pick List button to select or create a new department.

Job Title: Select the employee's job description (for example, Senior Widget Developer). Use the Pick List button to select or create a new title.

Location: Select the location where the employee is based. These locations can defined in and selected from the available Pick List.

Reports To: Select the name of the employee to whom this employee is to report. Use the Pick List button to select the employee.

Full/Part Time: Select the type of employment (for example, full or part time). Use the Pick List button to select or create a new employment type.

Tip: *Full-time and part-time employees can be easily grouped. See "Creating and Maintaining Groups" on page 286.*

Contract Type: Select the employee's contract type (such as Permanent, Contractor or Temporary). Use the Pick List button to select or create a new contract type.

Contract End Date: Select the date on which an employee's contract of employment ends. The format of the date depends on your Windows settings (see "Setting the Date Format Used by Windows" on page 59).

Tip: *Changes to the Contract End Date can create automatic diary reminders. See "Setting Diary Reminder Preferences" on page 81.*

Notice Period: Select the period that an employee must be given before terminating their employment. Use the Pick List button to select or create a new notice period.

Status: Select the employment status. Typical classifications include: Active, Left and Suspended. Use the Pick List button to select or create a new employment status.

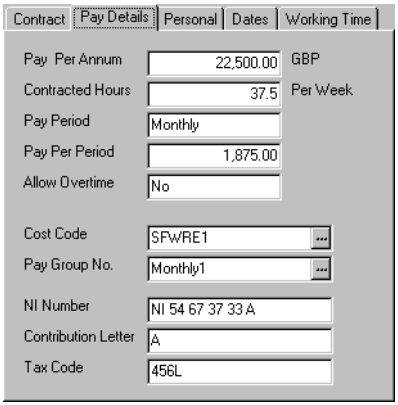
Tip: *Changes to the employee's status can be used to trigger career events. See "Setting Career Event Preferences" on page 80.*

Grade: Select the employee's salary grade. Use the Pick List button to select or create a new grade.

Assistant: If an employee is an assistant to another employee, select True. An assistant is an employee who reports directly to another employee and does not have any subordinates under them.

Pay Details Tab

This tab provides a summary of the employee's current pay, payroll and tax details.



It has two distinct areas:

- The fields in yellow are calculated fields, and are updated automatically when you modify the employee's Pay Record.
- The other fields are where you enter information.

The Pay Details tab contains the following calculated fields. You cannot enter data into these fields.

Pay: The employee's current pay, either Per Annum or Per Hour (as shown to the right of the field). This is updated automatically from the employee's Pay Record.

Contracted Hours: The number of hours that an employee is contracted to work, usually specified as Hours per Week (the units are shown to the right of the field). This is updated automatically from the employee's Pay Record.

Pay Period: The frequency of payment — 2 weekly, 4 weekly or monthly as set up for the employee. This is updated automatically from the employee's Pay Record.

Pay Per Period: The caption for this field depends on the employee's pay method and pay period. For employees with a pay basis of Salary, Hourly and Daily, the pay per pay period is displayed (for an employee with a pay

period of weekly, the caption will read "Pay per Week"). For employees with a pay basis of Shift, the pay per shift is displayed.

Allow Overtime: Indicates if the employee is allowed to work overtime. This is updated automatically from the employee's Pay Record.

Enter data into the following data fields:

Cost Code: Select the accounting code appropriate to the employee's post and pay. Use the Pick List button to select or create a new cost code.

Pay Group Number: Select the company pay group that the employee is a member of. Use the Pick List button to select or create a new pay group.

NI Number: Enter the employee's National Insurance number. If you are exporting data from Personnel Director to Payroll Manager, do not enter spaces in the NI number field, as they will be removed during export.

Contribution Letter: Enter the employee's National Insurance contribution letter.

Tax Code: Enter the employee's current tax code (i.e. 344L).

Note: *For a complete listing of all the pay calculations used in Personnel Director,* *see "Understanding Pay Period Calculations" on page 597.*

Personal Tab

This tab contains miscellaneous personal details for the employee.

The following employee fields are on the Personal tab.

Gender: Select the employee's gender from the drop-down list.

Ethnic Origin: Select the ethnic origin of the employee. Use the Pick List button to select or create a new ethnic origin.

Marital Status: Select the marital status of the employee. Use the Pick List button to select or create a new status.

Driving Licence: Select the employee's driving licence type such as Full, Provisional, HGV or PSV. Use the Pick List button to select or create a new type.

Vehicle Reg. No: Select the vehicle registration number of the employee. For more information about entering registration numbers, see "Adding Company Vehicle Details" on page 77.

Home Telephone: Enter the employee's home telephone number.

Mobile Telephone: Enter the employee's mobile telephone number.

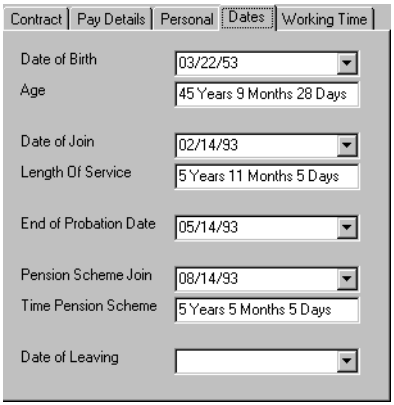
Fax Number: Enter the employee's home fax number.

Work Telephone/Extension: Enter the employee's work telephone number and extension.

Email: Enter the employee's email address.

Dates Tab

Key dates relating to the employee are entered on this tab. Select dates using the Calendar button at the right of each field. The calculated fields shown in yellow display elapsed time in days and months. The format in which the dates are displayed and entered is determined from your Windows settings (see "Setting the Date Format Used by Windows" on page 59).



The following employee fields are on the Dates tab. You cannot enter data into the fields that are automatically calculated.

Date of Birth. Select employee's date of birth.

Age. Automatically calculated from the employee's date of birth.

Date of Join. Date of hire, as created with the New Employee Wizard or entered manually.

Length of Service. Automatically calculated from the employee's date of join.

End of Probation Date. Select the date on which the employee's probationary period with the company ends.

Pension Scheme Join. Select the date on which the employee joined the company pension scheme.

Time Pension Scheme. This field is automatically calculated from the Pension Scheme Join date field.

Date of Leaving. Select the date on which the employee left the company. This can be a date in the future, for example the employee may be leaving

the company in a month. You can use this date to archive leavers (see "Archiving Employees Based on Date of Leaving" on page 129).

Tip: *The Date Of Join and Date Of Leaving fields are automatically entered as Career Event triggers when Personnel Director is installed. End Of Probation Date is automatically entered as a Diary Reminder trigger. You can create Career Event and Diary Reminder triggers for other important dates. See "Career History" on page 207 and "Diary Reminders" on page 277).*

Automatically Generated Headcount Statistics

Within each database (Sample, Personnel and Archive), there is a table called TurnOver. This table is used to monitor employee headcounts within the organisation and is updated whenever an employee leaves or joins the company. The table contains the following information:

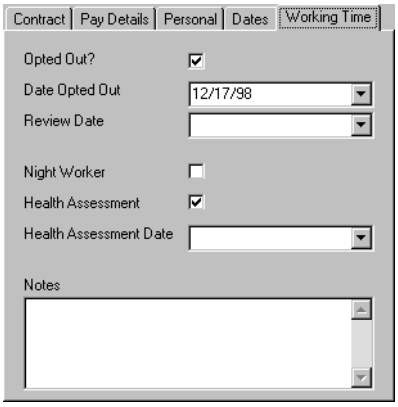
- Year
- Month
- Division
- Department
- Location
- Gender
- Ethnic Origin
- Number of Employees Left
- Number of Employees Joined
- Total Employees in Database

When you either create a new employee record or transfer an employee from the Archive database to any other active database, you are asked if you want to update the headcount statistics. If you select Yes, a record is created in the TurnOver table.

Similarly, when you either delete an employee record, or set the Date of Leaving for an employee, or transfer an employee from an active database to the Archive database, you are asked if you want to update the headcount statistics. If you select Yes, a record is created in the TurnOver table. There are several reports that you can print to display these headcount statistics.

Working Time Tab

Use the Working Time tab to enter the employee's Working Time Directive status.



The following employee fields are on the Working Time tab.

Opted Out? If the employee has signed a letter opting out of the Working Time directive, select this checkbox.

Date Opted Out. The effective date that the employee opted out of the Working Time directive.

Review Date. The date on which the employee's status under Working Time will be reviewed.

Night Worker. If the employee is required to work nights, select this checkbox.

Health Assessment. If the employee has had a health assessment related to working nights, select this checkbox.

Health Assessment Date. Select the date of the employee's health assessment from the drop-down calendar.

Notes. Notes about the employee's Working Time status.

8 RECORDING AND TRACKING HOLIDAY AND ABSENCE

Recording and tracking time that employees are absent for scheduled or unscheduled reasons is an ongoing task. With Personnel Director, you can set up absence allowances with anniversary dates or start dates linked directly to each employee's holiday and absence records. Personnel Director stores the start and end date for each employee's absence allowance year and calculates any carry over that needs to be performed at year end.

To set up and maintain absence allowance records, you:

- Use the Absence Allowance Wizard to create all the different types of allowances required for employee holidays as well as absences due to training, sickness and other reasons.
- Assign absence allowances to employees.
- Assign work periods to employees if absence days and hours lost are to be based on employee work periods.
- Enter holiday and absence records.
- Perform end of year maintenance.

Entering Holiday and Absence Records

Use the Holiday and Absence screens to track employee attendance history for authorised absence, unauthorised absence, sickness and holiday. Absences and holidays can be recorded in either hours or days, as determined when you set up your company absence allowances. For more information, see "Defining Company Absence Allowances with the Absence Allowance Wizard" on page 66.

Once a holiday or absence has been entered into Personnel Director, you can use the Absence Calendar and Absence Schedule charts to detect conflicting absence (when more than one key employee is absent at the same time) and patterns of absence.

You can also use these screens to track an employee's annual holiday. The amount of used and unused leave is shown on the Summary screen. This is based on the employee's annual holiday allowances.

Displaying Holiday and Absence Summary

1. Do one of the following.

   - On the Absence and Payroll Shortcut bar, click the Holiday and Absence button.

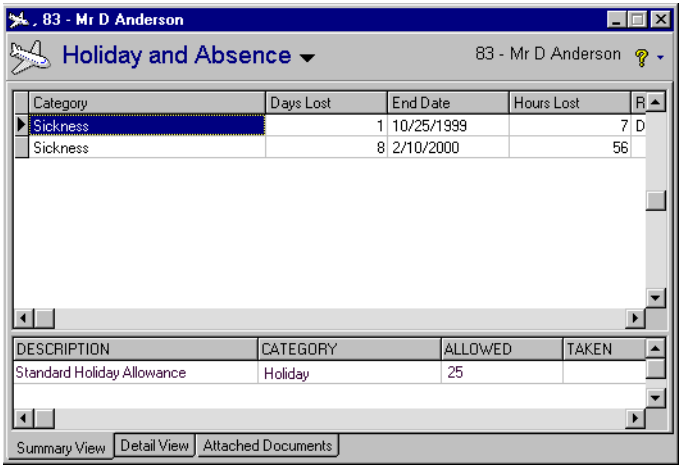
     – or –

   - From the Screen menu, select Open Screen. Select Holiday and Absence from the Screen list and then click OK.

   On the Summary View tab, the top of the screen displays holiday and absence records for the current employee. Use the Employee Navigation or Q Find buttons to locate another employee whose holiday and absence records you want to view.

   The lower pane displays the current employee's absence allowances for the current year. These are the allowances created with the Absence Allowance Wizard that you assign using the Wizard, or by clicking the Absence Allowances button on the Absence and Payroll Shortcut bar.

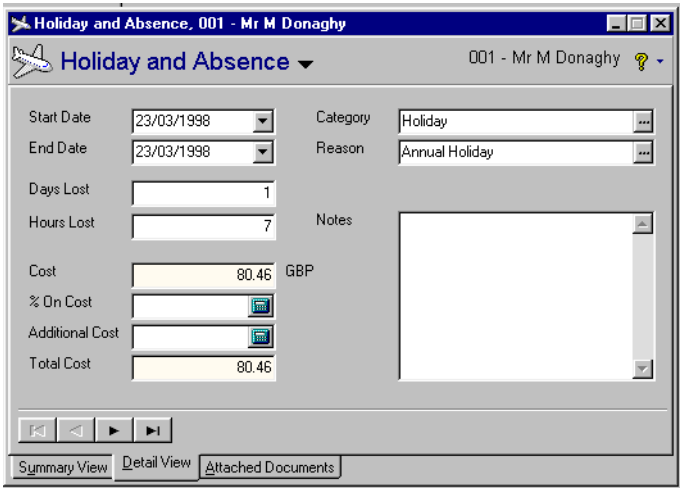
   You can also view Holiday and Absence schedules, as described in "Displaying Holiday and Absence Schedules" on page 174 and Holiday and Absence calendars, as described in "Displaying Holiday and Absence Calendars" on page 173.



Editing Holiday and Absence Details

On the Holiday and Absence Detail screen, you can add new, edit or delete employee absence records.

1. On the Holiday & Absence Summary screen, select the record that you want to display and click the Detail View tab, or double click the record.



2. For detailed instructions for editing, adding and deleting records, refer to “Detail Screens” on page 115.

- For adding and editing records, refer also to the following description of data entered on this screen.

Data Entered on this Screen

Start Date. The date on which the absence or holiday began. This can be selected from a Calendar button. The format of dates depends upon your Windows settings (see "Setting the Date Format Used by Windows" on page 59).

End Date. The date on which the absence or holiday ended. This can be selected from a Calendar button.

Days Lost. Calculated automatically from the Start and End dates of the holiday or absence, but can be over-typed. The calculated duration depends upon whether or not it is based on the company pay period or employee work period and whether weekends have been set to be included (see "Setting Absence Preferences" on page 85).

Hours Lost. Calculated automatically from the Start and End dates, but can be over-typed. The calculated duration depends upon whether or not it is based on the company pay period or employee work period and whether weekends have been set to be included (see "Setting Absence Preferences" on page 85).

Category. Personnel Director uses the Category field to determine which absences to deduct from the employee's annual allowance. For example, you might create Holiday Agreed, Leave of Absence and Sabbatical as holiday categories that are deducted from annual allowances. Create other general absence categories (such as Sickness, Training, and Unauthorised) for other types of absence. This is very important for reporting purposes, as you can use it to group your employee absences into distinct categories for analysis.

Tip: *Use the absence Category to define a broad range of absence reasons, such as Holiday Agreed and Sickness. Then use the absence Reason to define subgroups for each of the absence Categories. For example, 'Sickness' might be an absence Category, and Influenza, Cold, and Back Pain could be absence Reasons.*

Reason. Contains a more detailed description of the absence. This is a subgroup of Category (see Category above). You should use the Pick List for this field to standardise your data.

Cost. The cost of the absence or holiday, which is calculated automatically from the Hours Lost field, using the employee's hourly rate.

Hourly rate (from employee's current pay record) x Hours lost

The cost is calculated by multiplying the current hourly rate by the contracted hours per week and dividing by 5 days.

For more information about absence and pay calculations, see "Understanding Pay Period Calculations" on page 597.

The value in this field cannot be modified.

% on Cost. Additional on-costs incurred by the company such as National Insurance or Pension contributions.

Additional Cost. Additional costs incurred by the company as a result of the absence, such as the cost of temporary staff. By adding this data at this stage, you can report on the cost of absenteeism both in terms of salary costs to the company and in terms of 'true' costs, including all other costs which are directly related to the absence.

Total Cost. A calculated field, the total of all the costs for the absence. This is calculated as follows:

Cost + % on Cost + Additional Costs

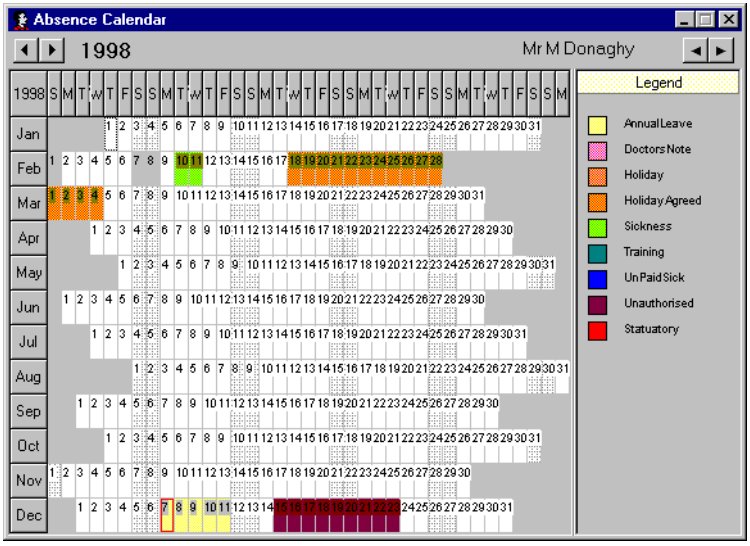
where % on Cost is a percentage value of Cost.

Notes. A free format notes field for you to add any information relating to the Absence record.

Displaying Holiday and Absence Calendars

Use the holiday and absence calendar to view the current employee's holiday and absence in chart form. This is useful for spotting patterns of absence or just to get an overview of any planned holiday.

- To display this screen, select Absence Calendar from the Tools menu.



Changing the Chart Colours

Each absence is displayed in a separate colour and a legend is provided on the right of the screen.

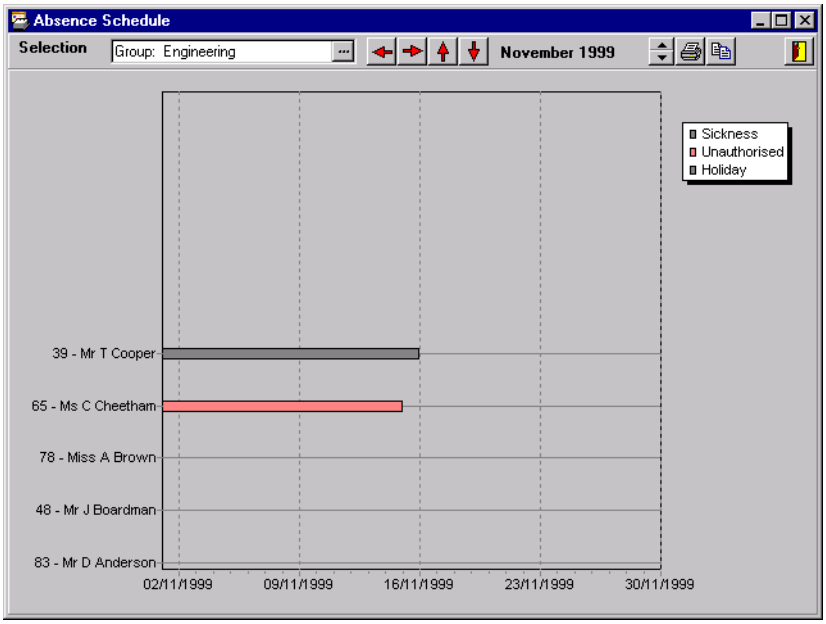
- To change these colours, click the Legend color square, select the colour you want on the Colour screen, then click OK. To define custom colours, click the Define Custom Colours button.

Displaying Holiday and Absence Schedules

Use the Holiday and Absence Schedule to view the current employee's holiday and absence periods on a chart together with the absences of other employees. In this way, you can spot if two or more employees are going to be absent during the same period, rendering you short of staff.

Note: *A maximum of 200 employees is set as the default to chart on this screen. This is to prevent the chart from becoming too cluttered and unintelligible.*

- To display this screen, select Absence Schedule from the Tools menu.



The schedule shows absence for a number of employees. Each employee's absence is colour coded by type according to the legend set in the Absence Calendar.

Changing the View

By default, a four-week view is displayed. To change the view, click one of the following buttons.

- To change to the previous month, click the Previous button beside the year or month.

- To change to the next month, click the Next button beside the year or month.

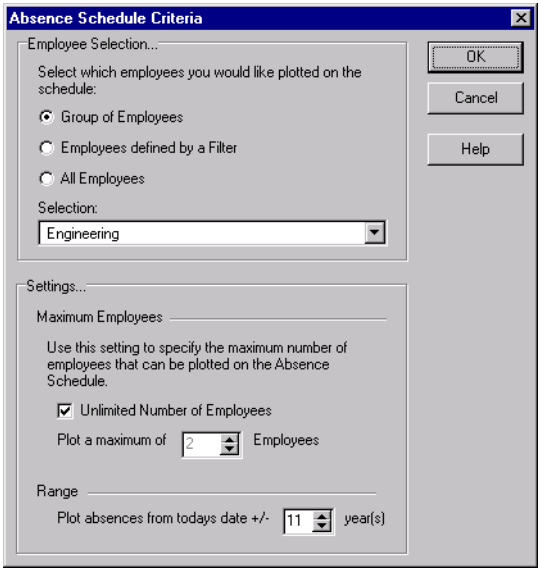
  For each period, you can easily identify any employees with overlapping holiday and absence schedules.

Determining Which Employees Appear on the Chart

The absence schedule displays the current employee's absence together with a number of other employees' absence records. You can create a group or define a filter to display only certain employees or types of absence. You can also set the maximum number of employees to display on the schedule.

1. Click the Selection pick list button.

   The Absence Schedule Criteria screen appears.



2. Provide the following information:

   Employee Selection. Select the employees you want to be included.

   Group of Employees. Click this option if you want to select employees by group. Then select the group you want from the Selection drop-down list.

   Employees Defined By Filter. Click this option if you want to select employees by filter. Then select the filter you want from the Selection drop-down list.

   All Employees. Click this option if you want all employees to be included.

Selection. If you clicked the Group of Employees or Employees Defined By Filter options, select the name from the drop-down list.

Settings. You can alter the display settings.

Maximum Number of Employees. Set the maximum number of employees to displayed on the chart.

To display all employees, click the Unlimited Number of Employees checkbox.

To display a specific number of employees, clear the Unlimited Number of Employees checkbox and set or type the desired number.

Range. Set the time range for the chart in years. For example, you typed 2, the time range spans a year previous to the current date to a year in advance of today's date (2 years).

3. Click OK.

Using Other Absence Schedule Functions

Use these buttons to perform the following functions.

To	Click
Scroll up the list of employees	
Scroll down the list of employees	
Change the spacing between employee records	
Preview or print the chart	
Copy the chart to the clipboard	
Exit Absence Schedule	

Setting and Displaying Absence Allowances

Every company has an absence allowance policy — the number of days/hours of paid absence that employees are entitled to per year. You can create and track any type of absence, not only holidays and leave, but also absences for reasons of sickness, training, or personal reasons.

Personnel Director initially uses the Absence Allowance defaults you set as preferences when you set up Personnel Director for use with your company. For more information, see "Defining Company Absence Allowances with the Absence Allowance Wizard" on page 66.

You can use a system of allowances based on length of service, age, or neither of the above criteria. The allowance can be a number of days allotted annually or it can be accrued on a weekly or monthly basis.

All the absence allowances you define are available to be assigned to employee records. You can assign allowances to all employees, or to a group of employees you define through a group membership or an employee filter.

Assigning Work Periods

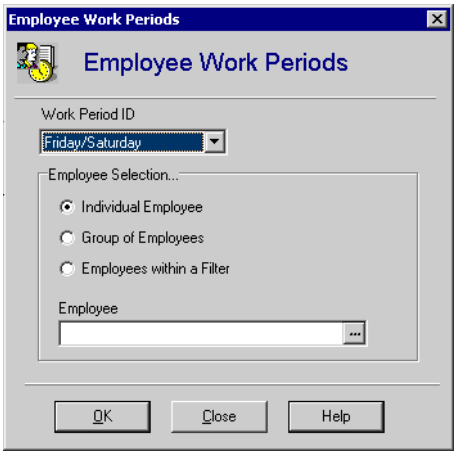
Personnel Director can calculate absence hours lost and hours lost based on company pay periods or on employee work periods. You specify which calculation is to occur when setting up the company (see "Setting Absence Preferences" on page 85). You then define one or more work periods for your organization (see "Defining Employee Work Periods" on page 73.)

You can assign a work period to an individual employee or to a group of employees you define through a group membership or an employee filter.

***Note**: Calculations for any employee not assigned a work period will be based on the company pay period.*

To assign a work period to one or more employees

1. From the Employees menu, select Employee Work Periods.



2. Select the period you want to assign from the Work Period drop-down list.

   If the work period is not in the list, you can define it. For instructions, see "Defining Employee Work Periods" on page 73.

3. Identify the employees to be assigned this work period. Do one of the following:

   - To assign an individual employee, select the Individual Employee option, then click the Employee pick list button. Select the employee to be assigned the work period and click OK.
   - To assign a group of employees, select the Group Of Employees option and select the name of the group from the Group drop-down list.
   - To assign a group of employees using a filter you previously defined, select the Employees Within A Filter option and select the name of the filter from the drop-down list.

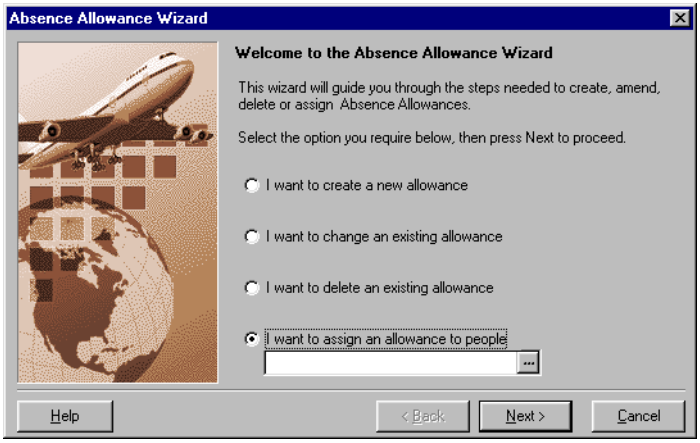
4. When you are finished, click OK.

Assigning Absence Allowances to Multiple Employees

Although you can assign absence allowances to individual employees, there will be times when you want to simultaneously assign allowances to groups of employees, or to all employees. Use this feature if, for example, a large number of employees share the same allowance for holiday or training, or if you are upgrading and have many employee records to update.

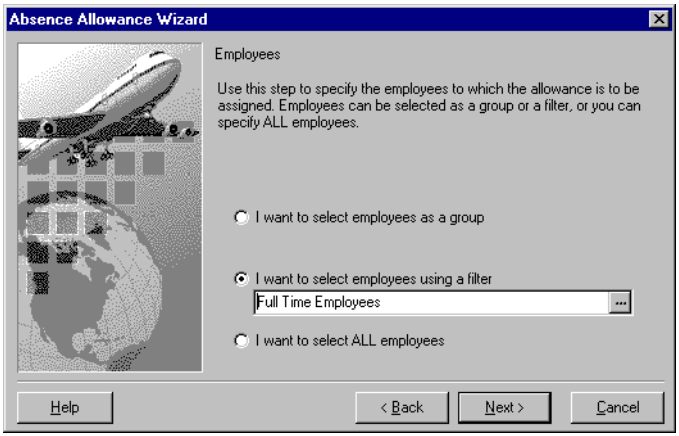
You assign absence allowances to multiple employees using the Absence Allowances Wizard.

1. Select Absence Allowances from the Company menu.

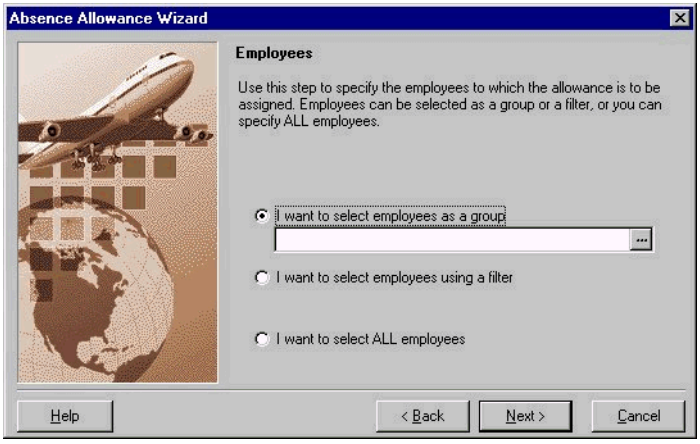

Absence Allowance Wizard
Welcome to the Absence Allowance Wizard
This wizard will guide you through the steps needed to create, amend, delete or assign Absence Allowances.
Select the option you require below, then press Next to proceed.
I want to create a new allowance
I want to change an existing allowance
I want to delete an existing allowance
I want to assign an allowance to people
Help
< Back
Next >
Cancel

2. Select the option I Want to Assign an Allowance to People. From the Pick List, select an allowance you previously created and click OK.

3. Click Next.

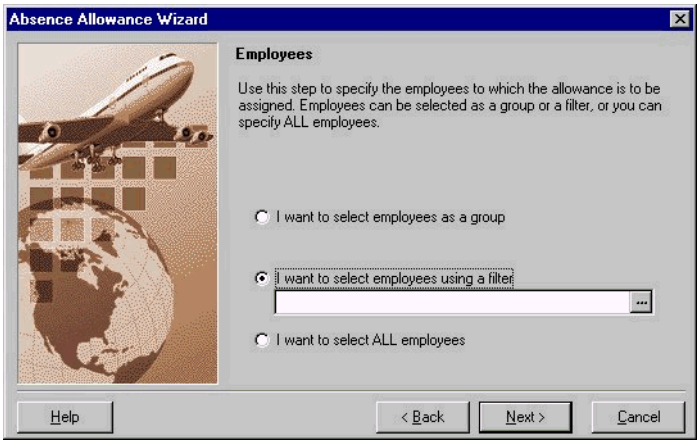

Absence Allowance Wizard
Employees
Use this step to specify the employees to which the allowance is to be assigned. Employees can be selected as a group or a filter, or you can specify ALL employees.
I want to select employees as a group
I want to select employees using a filter
Full Time Employees
I want to select ALL employees
Help
< Back
Next >
Cancel

4. Specify the employees to whom you want to assign allowances and then click Next.
   - To assign an allowance to a group, go to step 5.
   - To assign an allowance to employees you have chosen by defining an Employee Filter, go to step 6.
   - To assign an allowance to all employees, go to step 7.
5. To specify a group, click I Want To Select Employees as a Group.


Absence Allowance Wizard
Employees
Use this step to specify the employees to which the allowance is to be assigned. Employees can be selected as a group or a filter, or you can specify ALL employees.
I want to select employees as a group
I want to select employees using a filter
I want to select ALL employees
Help
< Back
Next >
Cancel

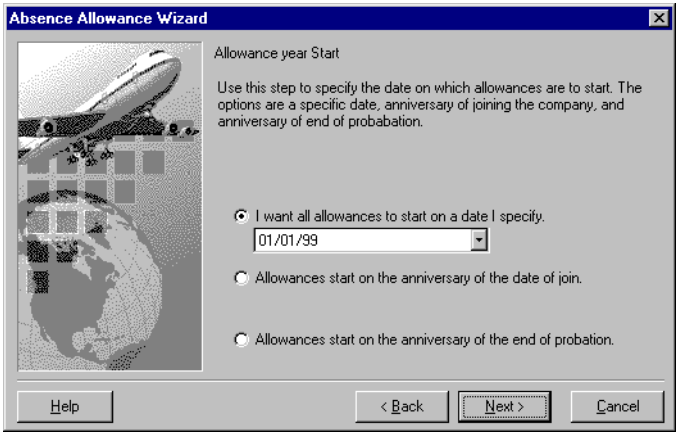
   - Click the Pick List button, and select the group to which you want to assign absence allowances.

6. To specify a group of employees you have defined with a filter, click I Want To Select Employees Using a Filter.


Absence Allowance Wizard
Employees
Use this step to specify the employees to which the allowance is to be assigned. Employees can be selected as a group or a filter, or you can specify ALL employees.
I want to select employees as a group
I want to select employees using a filter
I want to select ALL employees
Help
< Back
Next >
Cancel

- Click the Pick List button and select an Employee Filter from the list.

7. To assign the allowance to all employees, click I Want to Select ALL Employees.


Absence Allowance Wizard
Allowance year Start
Use this step to specify the date on which allowances are to start. The options are a specific date, anniversary of joining the company, and anniversary of end of probabation.
I want all allowances to start on a date I specify.
01/01/99
Allowances start on the anniversary of the date of join.
Allowances start on the anniversary of the end of probation.
Help
< Back
Next >
Cancel

8. Select the start date for the allowance:

- To set the date, click I Want All Allowances to Start on a Date I Specify, then enter the date or select the date from the drop-down calendar.

- To start all allowances on the anniversary date of the day the employee joined the company, click Allowances Start on the Anniversary of the Date of Join.
- To start all allowances on the anniversary date of the end of the employee's probation, click Allowances Start on the Anniversary of the End of Probation.

9. Click Next, then click Finish.

   Allowances are assigned to the selected employees and a progress bar is displayed. If an employee already has an allowance of the selected type for the current year, that allowance takes precedence and is retained.

Displaying Absence Allowance Summaries

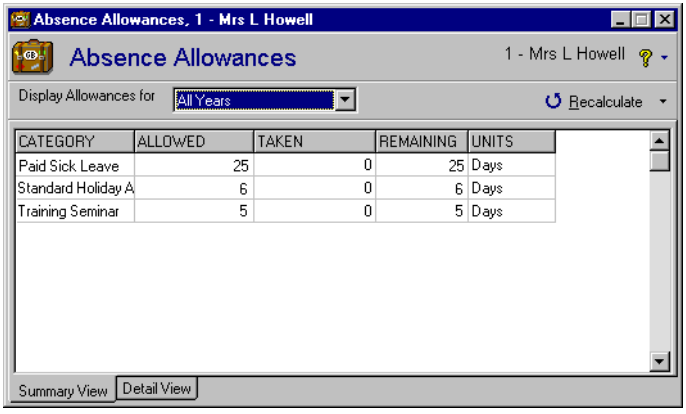
Use this screen to set and display the employee's absence allowance by year.

1. Navigate to the record of the employee for whom you want to set or display absence allowances.
2. Do one of the following.

- On the Absence and Payroll Shortcut bar, click the Absence Allowance button.

  – or –

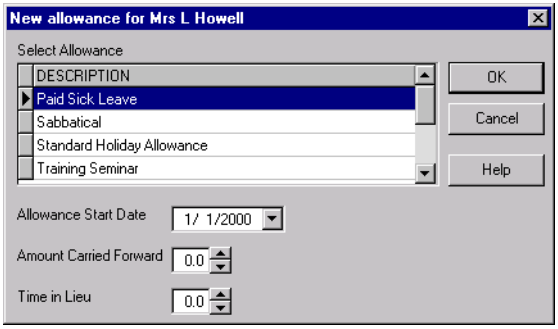
  From the Screen menu, select Open Screen. Select Absence Allowance and then click OK.



The Absence Allowances Summary screen displays the allowances assigned to the current employee for the current year.

- To change the view, click the Display Allowances For drop-down list.
  - To display allowances for all years, select All Years.
  - To display allowances for one prior year, select that year.

3. To assign an absence allowance, click the New button on the Record toolbar.



4. Set the Allowance Start Date for the allowance by selecting the date from the drop-down calendar. The default is the 1st of January of the current year, but you should set the date as appropriate for your company year. This date is used in year end allowance calculations.
5. You should not have to set Amount Carried Forward and Time in Lieu for a new allowance, but you can edit them at any time, as described below.
6. Click Save when you are finished setting or viewing the allowances.

Modifying Absence Allowances

If required, you can modify some details of an employee's absence allowance.

Use this screen to display the employee's absence allowance.

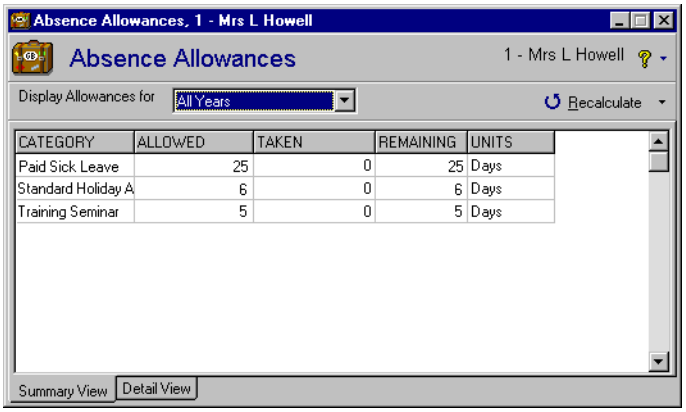
1. Navigate to the record of the employee for whom you want to display absence allowance details.

2. Do one of the following.

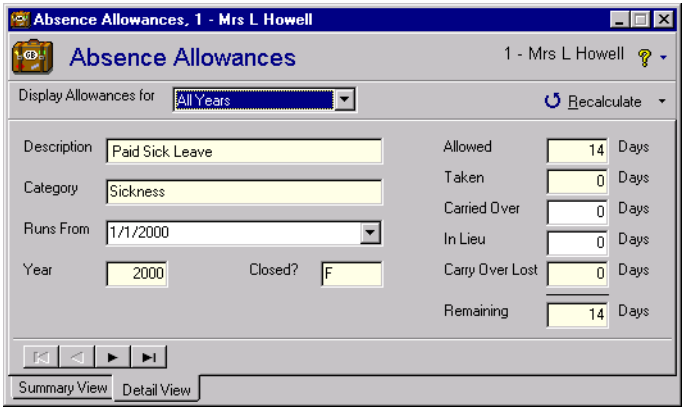
- On the Absence and Payroll Shortcut bar, click the Absence Allowance button.

  – or –

  From the Screen menu, select Open Screen. Select Absence Allowance and then click OK.



3. On the Summary View tab, double-click the absence allowance you want to edit, or select the allowance, then click the Detail View tab.



4. Edit any of the following details:

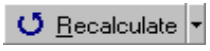
- **Runs From:** Type a new start date or select one from the drop-down calendar. For parental leave, this is the date on which the parental leave starts.

- **Runs To**. This field only appears for parental leave related absences. Type the end date when the parental leave period terminates.
- **Carried Over:** The number of days carried forward into the new year. Type the number of days. You can enter negative numbers.
- **In Lieu:** Time may be given in lieu of extra pay or overtime. Enter the number of days taken as time in lieu. You can enter negative numbers.
- **Allowed Days Per Year**. This field only appears for parental leave related absences. The number of days per year allowed as parental leave days. If required, you can change this number; entering 0 means the employee can claim an unlimited number of days in the year up to the number of allowed days.

5. Click the Save button.

Absence Allowance Calculations

The calculations in the following fields show the current employee's absence allowance, allowance taken, allowance carried over from the previous year, allowance taken in lieu, and allowance remaining.



1. To recalculate allowances, click the Recalculate button.

   ***Tip**: If you have created absence allowances for employees on an accrued basis, you should recalculate to ensure that the numbers are correct. To recalculate the allowances for the current employee, click the Recalculate button on this screen.*

- **Allowed:** The number of days or hours, depending on the company absence allowance settings, of annual leave that the employee is entitled to. This is determined by the employee's length of service, age, or neither, as set with the Absence Allowance Wizard. This number cannot be modified from this screen. To change it, you edit the definition of the Leave Allowance (see "Defining Company Absence Allowances with the Absence Allowance Wizard" on page 66).
- **Taken:** The amount of annual leave taken by the employee for the current year. This figure cannot be modified here. It is automatically calculated by summing all the days/hours lost which are marked as Annual Holiday in the employee's Holiday and Absence history.
- **Carried Over:** The number of days or hours of unused holiday carried across from the previous year. When the Absence Allowances screen is

opened, Personnel Director checks to see if the end of year carry over needs to be performed and generates this figure automatically as a result. You can also run the year end process by selecting Allowances Year End from the Company menu.

- **In Lieu:** Time given in lieu of extra pay or overtime.
- **Carry Over Lost:** Absence not taken in the current year that cannot be carried over, as defined with the Absence Allowances Wizard.
- **Closed:** Either True or False.
- **Remaining:** The number of days or hours of leave the employee has remaining this year. This is calculated as:

  Remaining = Allowed + Carried Over - Taken - Carry Over Lost + In Lieu

Allowances Year End Maintenance

At the end of your company leave year, you should perform the Allowances Year End procedure. When the end of the company absence allowances year has been reached and a new year begins, the amount of leave taken by all employees is set back to zero by Personnel Director.

If you selected Unused Allowances May Be Carried Forward on the Allowance Carry Over screen in the Absence Allowance Wizard, the year end procedure will carry forward any unused allowance and add it to the employee allowance for the new year. Otherwise, no allowance is carried forward.

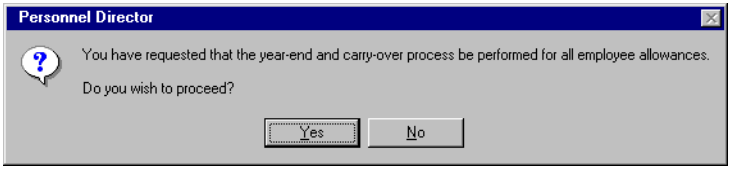
The Allowances Year End process is run only on the current database.

Processing Absence Allowances at Year End

1. Take one of the following actions:
   - Select Allowances Year End from the Company menu.

     -or-

   - Click the Absence Allowance button on the Absence and Payroll shortcut bar. Click ▼ beside the Recalculate button, and select Year End.


Personnel Director
You have requested that the year-end and carry-over process be performed for all employee allowances.
Do you wish to proceed?
Yes
No

2. To perform end of year allowance maintenance, click the Yes button. To exit without making any changes, click the No button.

9 WORKING WITH EMPLOYEE DATA

After you have entered an employee's record on the Employee Details screen (described in "Creating New Employee Records" on page 149), you can enter a wide range of additional data for that employee. The screens for entering this data are accessed from either the Screen menu or the Shortcut bar.

Locating Records

Over a period of time, the number of records for in a particular area such as Holiday and Absence may increase to the point where it is difficult to locate the record you want. To make it easier to locate the record, you can find it by specifying information you know is in the record or filtering records to extract only those with a particular item of information; for example, dental benefit records. You can also search the entire database for a record.

Finding Records By Field Content

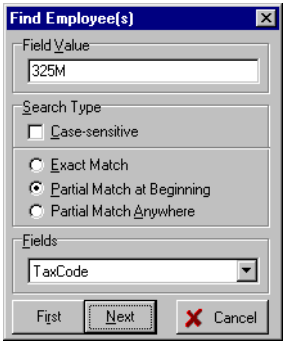
When you want to locate specific information on a record, you can locate an exact or partial match to the contents of a field.

1. From any employee screen except Employee Details, do one of the following:

   - On the Record toolbar, click the Find button.

     – or –

   - Select Find Records from the Screens menu or press Ctrl+F.



2. In the field value text box, type the information you want to find. For example, on the Medical History to find the records with the location James Street Clinic, type James Street Clinic.
3. Specify how to perform the search as follows.

   Case Sensitive. Check this box to locate only records that match in upper or lower case what you type.

   Exactly Match. The search result will include only records which match the Field Value exactly.

   Partial Match At Beginning. The search result will include only records which have the Field Value at the start of the field.

   Partial Match Anywhere. The search result will include records which have the Field Value anywhere in the field.
4. Select the Field that contains the information from the Fields list. In this example, you would select Location.
5. Click the First button to find the first match.

   The record is located and displayed by the record indicator on the Summary screen. To find the next record, press Ctrl+F and click the Next button.

Using Record Filters

Record filters are useful when you want to view only certain types of information for an employee. For example, extract only the dental benefit records, or only certain types of leave taken.

You can set up lists of records based on:

- A specific value of a field. For example, you want to view all records for absences that were due to holidays.
- A range of values for a field. For example, a list of holidays taken between certain dates.

If you find that you are specifying the same filter frequently or if you require more complex searching capability, you can create a query. For more information, see chapter 16 “Creating Queries” on page 357.

To set up a record filter based on a specific value

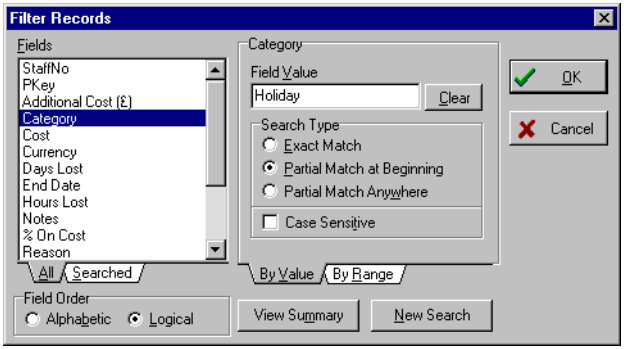
1. From any employee screen except Employee Details, do one of the following:

   - On the Record toolbar, click the Filter button.

     – or –

   - Select Filter Records from the Screens menu or press Ctrl+I.

   The Filter Records screen appears.



2. If you used the filter previously, click the New Search button.
3. From the list of fields on the All tab, select the field you want to use to find the records. (If the field is more likely to be based on a range, the By Range tab is displayed; if you still want to specify a specific value, click the By Value tab.)

   For example, to select all Holiday and Absence records where the employee took holidays, select the Category field, then type Holiday in the Field Value text box.

   Tip: *You can sort the list of fields. Under Field Order, click Alphabetical if you want to sort the fields alphabetically or Logical if you want to sort the fields as they appear on the Detail View tab.*
4. Indicate the value of the field which is to be used in the search:

   Field Value. Type the partial word, word, phrase, or value to be used in the search. To erase what you typed, click the Clear button.

   Search Type. Indicate how the search should be undertaken. Choose one of the following options:

   Exactly Match. The search result will include only records which match the Field Value exactly.

   Partial Match At Beginning. The search result will include only records which have the Field Value at the start of the field.

   Partial Match Anywhere. The search result will include records which have the Field Value anywhere in the field.

   For example, if you didn't know the exact name of the holiday, you could type a Field Value of "Hol" and select the Partial Match Anywhere option.
5. If the search is to differentiate between upper and lower case letters, click the Case Sensitive checkbox.
6. To view the search criteria, click View Summary. This is useful to verify the search criteria when you create more complex filters. When you are finished viewing, click OK.
7. When you are finished specifying the criteria, click OK.

   The list of records matching your search criteria is displayed.

To turn off a record filter

- Select Record Filters from the Screen menu and click the New Search button.

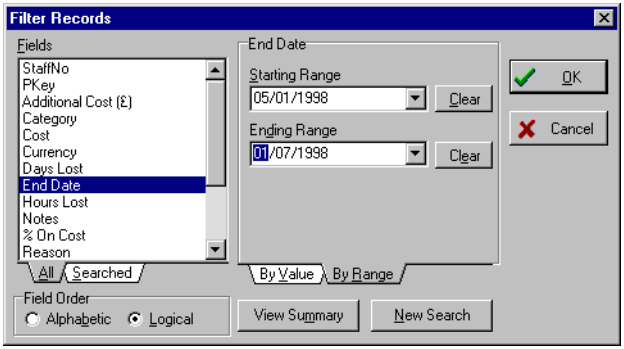
To set up a record filter based on a range of values

1. On the Record toolbar, click the Filter button.

   -or-

   Select Filter Records from the Screen menu or press Ctrl+I.

   The Filter Records screen appears.



2. If you used the filter previously, click the New Search button.
3. From the list of fields on the All tab, select the field you want to use to find the records. (If the field is more likely to be based on a value, the By Value tab is displayed; to specify a range, click the By Range tab.)

   For example, to select all absences prior to a certain date from the Holiday and Absence screen, select the End Date field.

   Tip: *You can sort the list of fields. Under Field Order, click Alphabetical if you want to sort the fields alphabetically or Logical if you want to sort the fields as they appear on the Detail View tab.*

4. Indicate the starting and ending value of the range:

   Starting Range. Type the partial word, word, phrase or value to be used as the starting point. To erase what you typed, click the Clear button.

   Ending Range. Type the partial word, word, phrase, or value to be used as the ending point. To erase what you typed, click the Clear button.

For example, to search for absences between January 5, 1998 and July 1, 1998, enter 05/01/1998 as the Starting Range and 01/07/1998 as the Ending Range.

5. To view the search criteria, click View Summary. This is useful to verify the search criteria when you create more complex filters. When you are finished viewing, click OK.
6. When you are finished specifying the criteria, click OK.

   The list of records matching your search criteria is displayed.

To refine the filter

Once you have created a filter, you can further refine the results using a different field value or range. For example, if you wanted to see who took holidays within a certain date range, you would first filter using Holiday as the Category, and then filter using the date range.

Searching the Database for Records

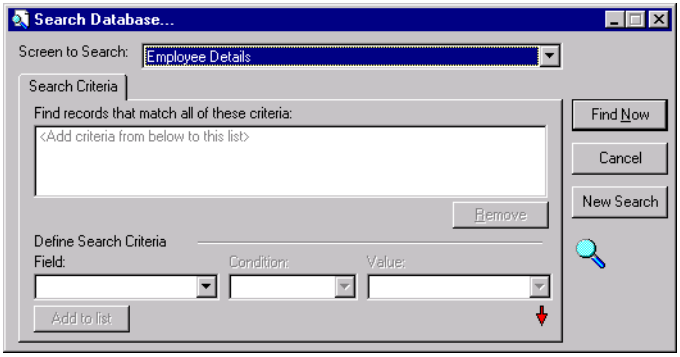
You can search the database for records

1. On the Tools toolbar, click the Search button.

   -or-

   Select Filter Records from the Tools menu.

   The Search Database screen appears.



2. Provide the following information:

   Screen To Search. Select the screen you want to search from the drop-down list.

   Define Search Criteria. Create an expression for the search.

   Field. Select the field to be used in the search.

   Condition. Select the condition, such as Equals or Is Greater Than Or Equal To, that is to be used in the search.

   Value. Type or select the value to be used in the search. To display values you can select from the drop-down list, click the button.

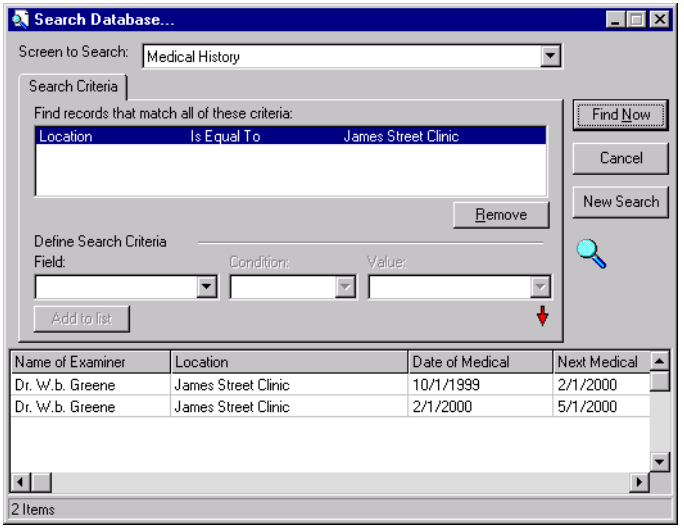
3. Click the Add To List button.

   The criteria you specified appears in the Search Criteria area.

4. Repeat steps 2 and 3 until you are finished specifying the search expressions required for this search.

5. Click the Find Now button.

   The criteria you specified appears in the Search Criteria area.



6. Do one of the following:
   - Double-click the record you want to display.
   - To remove an expression from the search criteria, select the expression and click the Remove button.
   - To clear the results and start a new search, click the New Search button.
   - To exit without completing the search, click the Cancel button.

Accident History

You can log accidents that have occurred in the work place. Accidents are logged against each individual, so if more than one person is involved in an accident, you need to create an accident record for each individual.

For detailed instructions for adding, editing and deleting records, refer to "Adding, Updating, Deleting and Printing Employee Records" on page 120.

Displaying Accident History Summaries

1. Navigate to the record of the employee for whom you want to display accident history data.
2. Do one of the following.
   - On the Employment Shortcut bar, click the Accident History button.

     – or –
   - From the Screen menu, select Open Screen. Select Accident History and then click OK.
3. Click the Summary View tab, if it is not already displayed.

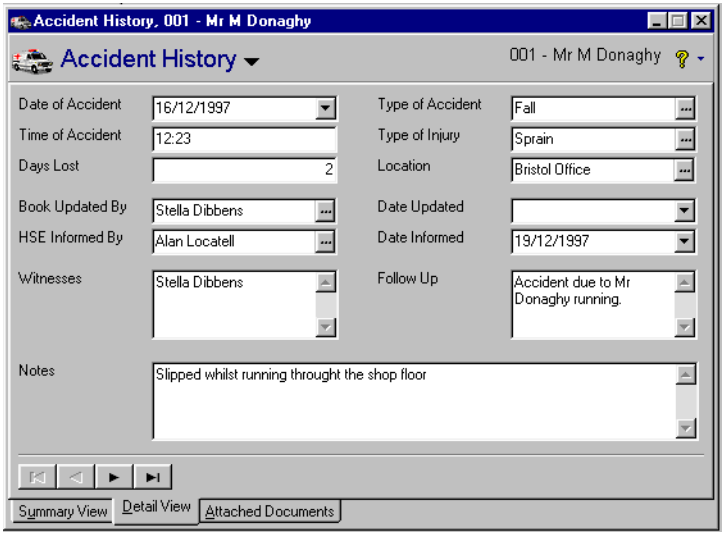
   The Accident History Summary screen lists all the accidents in the workplace that the current employee has been involved in.

Adding/Editing Accident Details

Use the Accident Detail screen to add, edit or delete employee accident records.

1. Do one of the following:

- To add a record, click the New button on the Record toolbar, or press Ctrl+N.
- To update a record, on the Accident History Summary View tab, select the record you want to work with and click the Detail View tab or double-click the record.



- For adding and editing records, refer also to the following description of data entered on this screen.

Data Entered on This Screen

Date of Accident. The date on which the accident occurred. The format of dates depends upon your Windows settings (see "Setting the Date Format Used by Windows" on page 59).

Time of Accident. The time at which the accident occurred. The format of the time is determined by your Windows settings, but is normally formatted as HH:MM, where HH is hours, MM is minutes (for example, 23:15 for 11.15 p.m.).

Type of Accident.The type of accident. This is used for classifying industrial accidents and reporting purposes.

Type of Injury. The type of injury the employee suffered, if any.

Days Lost. The number of working days lost as a result of the accident.

Location. The location where the accident occurred.

Accident Book Updated By. The name of the individual who updated the company accident book.

Date Updated. The date on which the accident book was updated.

HSE Informed By. The name of the individual who informed the Health and Safety Executive.

Date Informed. The date on which the Health and Safety Executive was informed.

Witnesses. The names of any witnesses to the accident, if any.

Follow Up. Any follow up action required following the accident.

Notes. A free form field for you to add information related to the accident.

Appraisal History

You can store the results of staff appraisals. Assessment criteria are recorded and scored along with key objectives, training agreed and comments.

Staff appraisals are linked to the Personnel Director diary. When an appraisal record is added or modified, a diary reminder is created for the date of the next appraisal. See "Setting Diary Reminder Preferences" on page 81.

For detailed instructions for adding, editing and deleting records, refer to "Adding, Updating, Deleting and Printing Employee Records" on page 120.

Displaying Appraisal Summaries

1. Navigate to the record of the employee for whom you want to display appraisal data.
2. Do one of the following.

- On the Employment Shortcut bar, click the Appraisal History button.

  – or –

- From the Screen menu, select Open Screen. Select Appraisal History and then click OK.

3. Click the Summary View tab, if it is not already displayed.

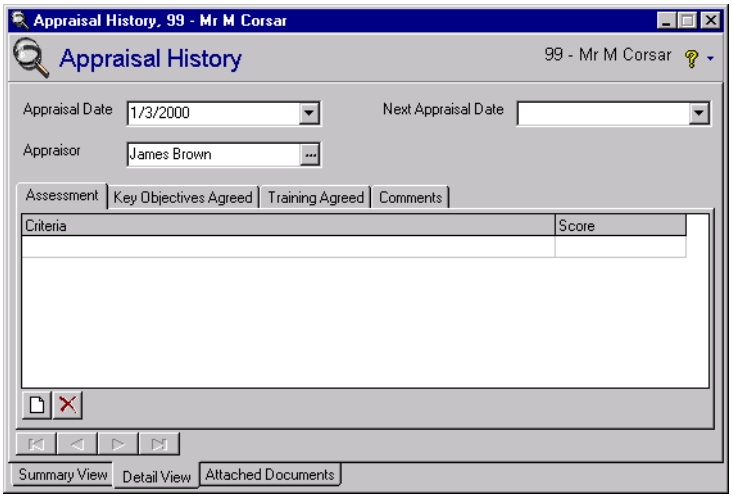
   The Appraisal Summary screen gives a summary view of all the appraisals conducted for the current employee. The screen displays the date of the appraisal, who conducted the appraisal and the date of the next appraisal. It contains all of the standard summary screen toolbar buttons and related functions (described in "Summary Screens" on page 113).

Adding/Editing Appraisal Details

Use the Appraisal Detail screen to add, edit or delete appraisal records for the current employee.

1. Do one of the following:

- To add a record, click the New button on the Record toolbar, or press Ctrl+N.
- To update a record, on the Appraisal History Summary View tab, select the record you want to work with and click the Detail View tab or double-click the record.



The screen has two sections. The top half of the screen displays the details of the appraisal – Date, Appraisor, Next Appraisal Date. The lower half of the screen contains tabs where you enter Assessment criteria, Key Objectives Agreed, Training Agreed and Comments for the current appraisal.

Data Entered on This Screen

1. Enter the data on the top of the screen as follows.

   Date of Appraisal. The date on which the appraisal took place. The format of dates depends upon your Windows settings (see "Setting the Date Format Used by Windows" on page 59).

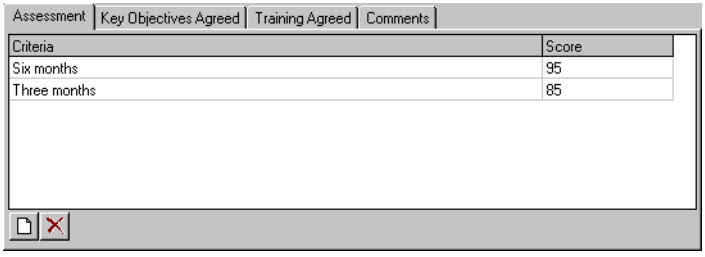
   Appraisor. The name of the individual who conducted the appraisal. A Pick List is provided for this field, so that you can maintain a standard list of appraisers.

   Date of Next Appraisal. The date on which the next appraisal should be conducted. This is automatically linked to the diary. When this date is changed, Personnel Director can prompt you to create a diary reminder for the next appraisal. For more details see "Setting Diary Reminder Preferences" on page 81.

2. For each of the tabs at the bottom of the screen, click the tab to select it. Then enter the data on that tab, as described in the following sections.

Data Entered on the Assessment Tab

Use this tab to record the criteria against which you are appraising the current employee.



1. Provide the following information.

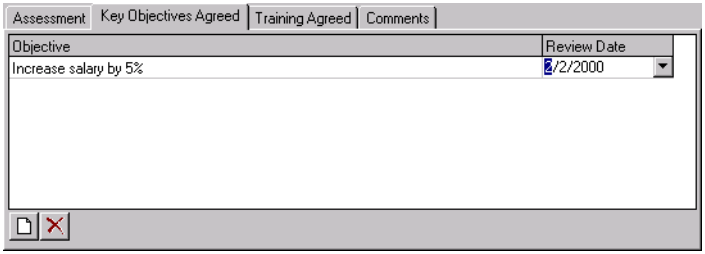
   Criteria. The criteria against which you are appraising the current employee.

   Score. The employee's score for that criteria. This could be Excellent, Good, Average, Poor or 1, 2, 3 etc.

2. Do one of the following:
   - To save the changes, click the Save button on the Record toolbar.
   - To add another assessment, click the Add button at the bottom of the screen.
   - To remove a criteria, select the criteria and click the Delete button at the bottom of the screen.

Data Entered on the Key Objectives Agreed Tab

Use this tab to record any objectives agreed as a result of the appraisal. For example, for a sales executive, these objectives could be to increase sales by 5% or to learn about a new product range.



1. Provide the following information.

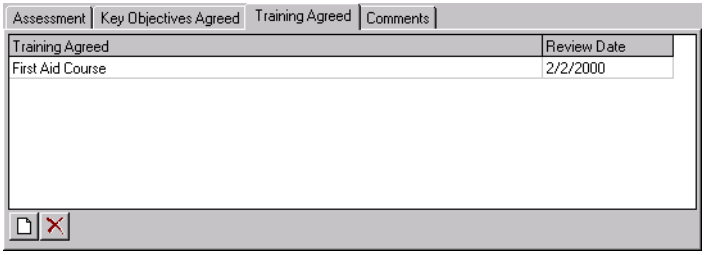
   Objective. The objective agreed (for example, Improve Time Keeping, Learn About New Product Range, Increase Sales by 5%).

   Review Date. The date on which the objective should be reached and reviewed.

2. Do one of the following:
   - To save the changes, click the Save button on the Record toolbar.
   - To add another assessment, click the Add button at the bottom of the screen.
   - To remove a criteria, select the criteria and click the Delete button at the bottom of the screen.

Data Entered on the Training Agreed Tab

Use this tab to record any training agreed on as a result of the appraisal.



1. Provide the following information.

   Training. The type of training required or the name of a particular training course.

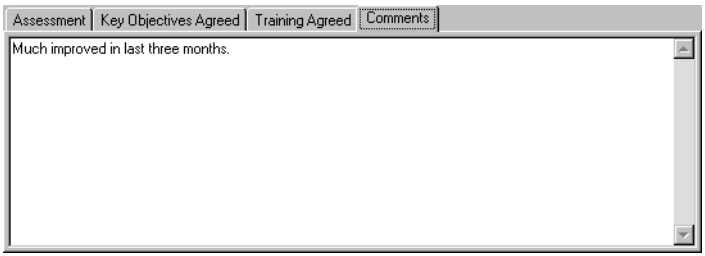
   Review Date. The date by which the training should have taken place.

2. Do one of the following:

   - To save the changes, click the Save button on the Record toolbar.
   - To add another assessment, click the Add button at the bottom of the screen.
   - To remove a criteria, select the criteria and click the Delete button at the bottom of the screen.

Data Entered on the Comments Tab

Use this free-format text field to enter any comments that you may have on the appraisal.



Bank Details

Use the Bank Details screen to record the details of the employee's main bank account (the one into which their salary is paid).

For detailed instructions for adding, editing and deleting records, refer to "Adding, Updating, Deleting and Printing Employee Records" on page 120.

Displaying Bank Detail Summaries

1. Navigate to the record of the employee for whom you want to display bank details.
2. Do one of the following.

   - On the Absence and Payroll Shortcut bar, click the Bank Details button.

     – or –

   - From the Screen menu, select Open Screen. Select Bank Details and then click OK.

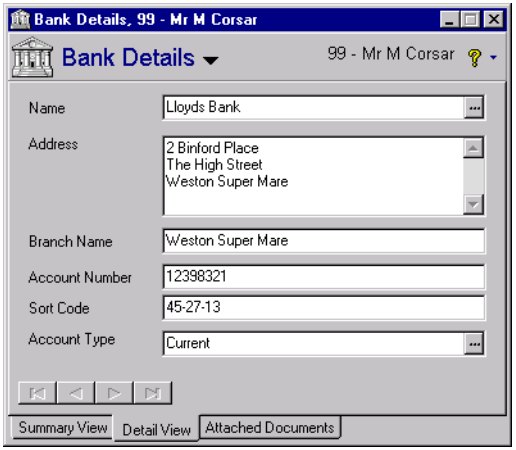
3. Click the Summary View tab, if it is not already displayed.

   The Bank Details summary screen displays all or the accounts for this employee.

Adding/Editing Bank Details

1. Do one of the following:

   - To add a record, click the New button on the Record toolbar, or press Ctrl+N.
   - To update a record, on the Bank Details Summary View tab, select the record you want to work with and click the Detail View tab or double-click the record.



Data Entered on This Screen

Bank Name. The name of the bank (such as Barclays Bank Plc, National Westminster).

Address. The full postal address of the bank.

Branch. The bank branch. This is useful when a bank has more than one branch in a town or city.

Account Number. The account number of the employee's main bank account (the one into which their salary is paid).

Sort Code. The bank sort code. This is a free-format field.

Account Type. The type of account the employee has (such as Current, Deposit Account).

Benefit Details

Use the Benefit screens to record taxable and non taxable benefits allocated to an employee during his/her time with the organisation. Such benefits could include mobile phones, season ticket loans, and private health care.

For detailed instructions for adding, editing and deleting records, refer to "Adding, Updating, Deleting and Printing Employee Records" on page 120.

Displaying Benefit Summaries

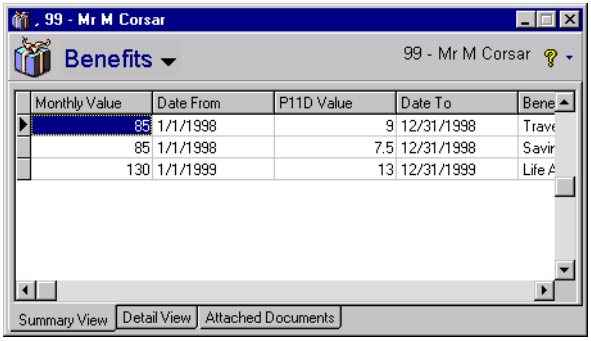
1. Navigate to the record of the employee for whom you want to display benefits data.
2. Do one of the following:

- On the Absence and Payroll Shortcut bar, click the Benefit Details button.

  – or –

- From the Screen menu, select Open Screen. Select Benefits and then click OK.

3. Click the Summary View tab, if it is not already displayed.



The Benefit Summary screen provides an overview of the Benefit History for the current employee. The summary data is displayed one record per line.

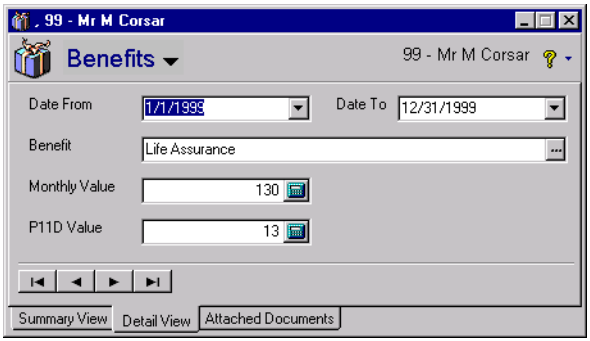
Adding/Editing Benefit Details

Use the Benefit Detail screen to add, edit or delete employee benefit records for the current employee.

1. Do one of the following:

- To add a record, click the New button on the Record toolbar, or press Ctrl+N.

- To update a record, on the Benefit Details Summary View tab, select the record you want to work with and click the Detail View tab or double-click the record.



Data Entered on This Screen

Date From. The date from which the benefit is effective.

Date To. The date on which the benefit ceases. If this date is left blank, the benefit is assumed to be effective indefinitely.

Benefit. A description of the benefit (such as BUPA, Luncheon Vouchers). A Pick List is provided for this field.

Monthly Value. The monthly value of the benefit. The format of this field depends on your Windows setting (see "Setting the Currency Format Used by Windows" on page 59).

P11D Value. The P11D value attributable to this benefit per year.

Career History

An individual's time with an employer consists of a series of 'events' ranging from joining the company to promotions, salary changes, change in employment status and so on. Personnel Director automatically creates career history events when, for example, an employee leaves or joins the company.

You can track and build a history of these events. Personnel Director can detect changes in certain pieces of data and prompt you to create career events. For more details, see "Setting Career Event Preferences" on page 80.

You can analyse Career Event history using Personnel Director's reporting features, and find information such as the number of people joining or leaving the company in a particular period.

For detailed instructions for adding, editing and deleting records, refer to "Adding, Updating, Deleting and Printing Employee Records" on page 120.

Displaying Career History Summaries

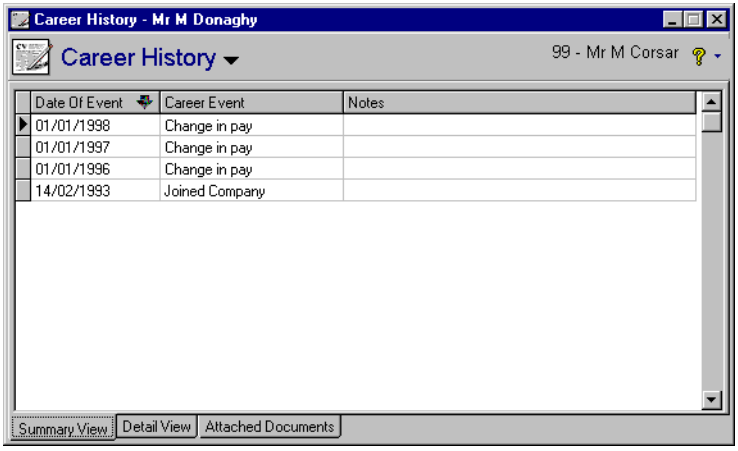
1. Navigate to the record of the employee for whom you want to display career history data.
2. Do one of the following:

   - On the Employment Shortcut bar, click the Career History button.

     – or –

   - From the Screen menu, select Open Screen. Select Career History and then click OK.

3. Click the Summary View tab, if it is not already displayed.



On the Summary View tab, the Career History Summary screen displays the career history of the current employee.

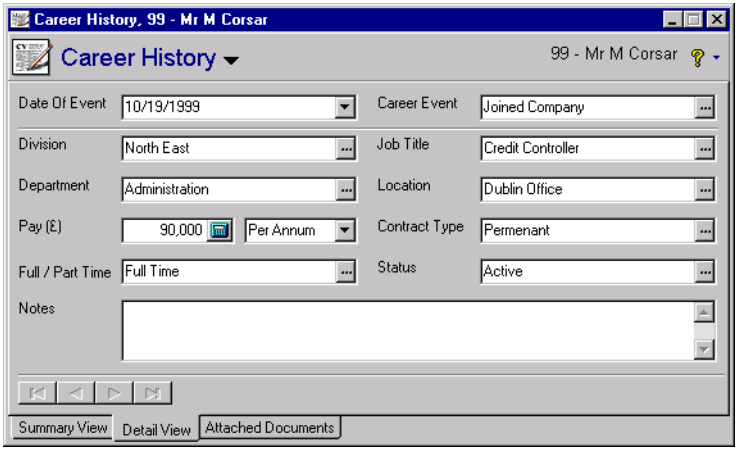
Career events can be triggered automatically (described in "Setting Career Event Preferences" on page 80). Or, you can enter them manually yourself.

Adding/Editing Career History Details

Use the Career History Detail screen to add, edit, or delete career events for the current employee.

1. Do one of the following:

   - To add a record, click the New button on the Record toolbar, or press Ctrl+N.
   - To update a record, on the Career History Summary View tab, select the record you want to work with and click the Detail View tab or double-click the record.



Career events are normally created automatically for you by Personnel Director, but you can add your own, or modify existing events using this screen.

The screen displays the date and type of career event together with the status of key pieces of data. If any of the data has changed then the new value is displayed; otherwise, the text <No Change> is displayed. This applies only if you let Personnel Director create the career events for you.

Data Entered on This Screen

Date of Event. The date on which the career event took place. The format of dates depends upon your Windows settings (see "Setting the Date Format Used by Windows" on page 59).

Career Event. The type of career event, for example Joined Company, Promotion, or Relocation. To keep your data consistent and reports accurate, you should use the Pick List for this field.

Division. The employee's division following the career event.

Department. The employee's department following the career event.

Job Title. The employee's job title following the career event.

Location. The employee's location following the career event.

Pay. The employee's pay following the career event.

Full / Part Time. The employee's employment status following the career event.

Contract Type. The employee's contract type following the career event.

Status. The employee's status following the career event.

Notes. Freeform notes pertaining to the career event.

Correspondence History

You have the option of keeping a record of any correspondence sent to an employee. Personnel Director creates a correspondence history record when you print mail merge letters if you indicate that you want to update the correspondence history and enter a description.

For detailed instructions for adding, editing and deleting records, refer to "Adding, Updating, Deleting and Printing Employee Records" on page 120.

Displaying Correspondence History Summaries

1. Navigate to the record of the employee for whom you want to display correspondence history data.

2. Do one of the following:

- On the Employee Shortcut bar, click the Correspondence History button.

  – or –

- From the Screen menu, select Open Screen. Select Correspondence History and then click OK.

3. Click the Summary View tab, if it is not already displayed.

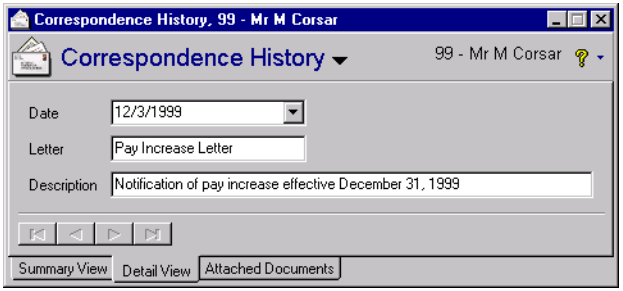
   The Correspondence History Summary screen displays the details of any correspondence with the employee.

Adding/Editing Correspondence History Details

You can edit or delete the correspondence records Personnel Director creates when you send mail merge letters.

1. Do one of the following:

- To add a record, click the New button on the Record toolbar, or press Ctrl+N.
- To update a record, on the Correspondence History Summary View tab, select the record you want to work with and click the Detail View tab or double-click the record.



Data Entered on This Screen

Date. The date of the correspondence.

Letter. The name of the word processor letter that was sent to the employee. Use the word processor to open the letter and get further details on what was sent.

Description. A description of the letter or why the letter was sent (such as End of Probation Letter, 1st Disciplinary Letter).

CPE/CPD Records

CPE/CPD Records are used to track training requirements for both structured training, such as courses and seminars, and unstructured training, such as self-study, reading, and so on. When you save a record on the Training History screen, the CPE/CPD record is automatically updated, so that you can track whether annual targets are being met and see variances at a glance.

For detailed instructions for adding, editing and deleting records, refer to "Adding, Updating, Deleting and Printing Employee Records" on page 120.

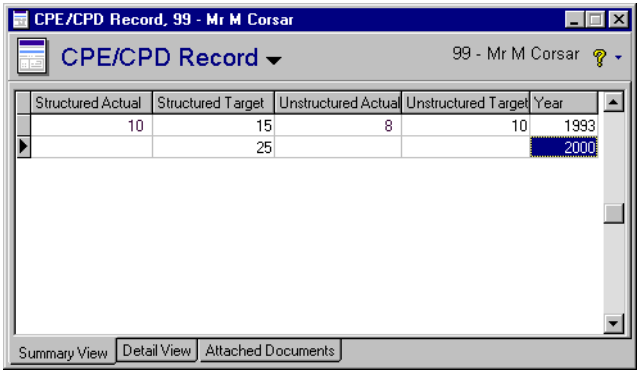
Displaying CPE/CPD Summaries

1. Navigate to the record of the employee for whom you want to display CPE/CPD records.
2. Do one of the following:

   - On the Training and Education Shortcut bar, click the CPE/CPD Record button.

     – or –

   - From the Screen menu, select Open Screen. Select CPE/CPD Record and then click OK.
3. Click the Summary View tab, if it is not already displayed



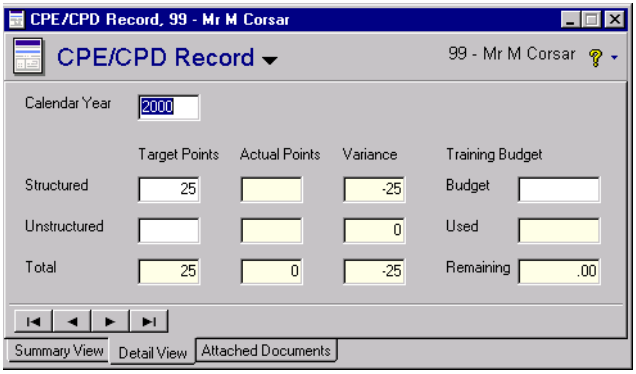
The CPE/CPD Record Summary screen appears. The screen displays the annual structured and unstructured training targets, actual training levels achieved, and the variance between the target and actual achievement.

Adding/Editing CPE/CPD Record Details

Use the CPE/CPD Record detail screen to add, edit, or delete continuing professional education and development targets for the current employee. The actual and variance amounts and budget used and remaining are automatically calculated from the Training History records.

1. Do one of the following:

   - To add a record, click the New button on the Record toolbar, or press Ctrl+N.
   - To update a record, on the CPE/CPD Summary View tab, select the record you want to work with and click the Detail View tab or double-click the record.



Data Entered on This Screen

1. Enter the calendar year for which you are recording target points and budget data.
2. In the Target Points column on the left, enter the target points for structured and unstructured training.
3. In the Training Budget column on the right, enter the annual budget allocated to this employee for training. Personnel Director will deduct training costs from this amount when you add records in Training History.

Disciplinary and Grievance

You can track the Disciplinary and Grievance history for each employee. Any number of disciplinary infringements can be recorded for a person and these can be graded by status, such as First Warning and Second Warning.

For detailed instructions for adding, editing and deleting records, refer to "Adding, Updating, Deleting and Printing Employee Records" on page 120.

Displaying Disciplinary and Grievance Summaries

1. Navigate to the record of the employee for whom you want to display disciplinary or grievance data.
2. Do one of the following:

   - On the Employment Shortcut bar, click the Disciplinary & Grievance button.

     – or –

   - From the Screen menu, select Open Screen. Select Disciplinary and Grievance and then click OK.
3. Click the Summary View tab, if it is not already displayed.

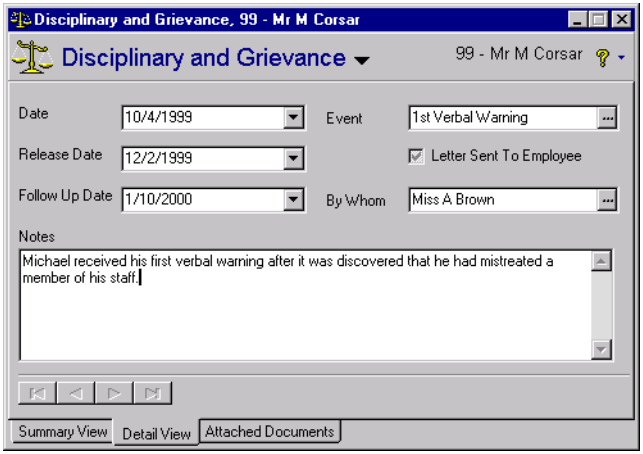
   The Disciplinary And Grievance Summary screen provides a summary of all the disciplinary and grievance records for the current employee.

Adding/Editing Disciplinary and Grievance Details

Use this screen to add, edit or delete disciplinary and grievance records for the current employee.

1. Do one of the following:

   - To add a record, click the New button on the Record toolbar, or press Ctrl+N.
   - To update a record, on the Disciplinary and Grievance Summary View tab, select the record you want to work with and click the Detail View tab or double-click the record.



Data Entered on This Screen

Date. The date on which the disciplinary or grievance event occurred.

Event. The disciplinary or grievance event (such as First Warning, Second Warning, Final Warning, Grievance Received, Grievance Actioned). To keep your data consistent and ensure reports are accurate, you should use the Pick List for this field.

Release Date. The date on which the disciplinary event is to be removed from the employee's record. Generally a first written warning remains on the employee's file for a period of 6 months. A reminder can be automatically inserted into the Diary for this date (see "Diary Reminders" on page 277).

Letter Sent To Employee. Tick this box to indicate if a letter was sent to the employee concerning this event. The Correspondence History contains the actual details of the letter.

Follow Up Date. The date by which some follow-up action should have taken place relating to the event. A reminder can be automatically inserted into the diary for this date (see "Diary Reminders" on page 277).

By Whom. The name of the individual responsible for any follow-up relating to the disciplinary or grievance event. The Pick List for this field displays a list of all the employees in the current database.

Notes. A free-format notes field to outline any further information relating to the event.

Education History

You can keep details of your employees' education. Details can be stored for any number of establishments, and can be grouped in categories such as University, College, or School.

For detailed instructions for adding, editing and deleting records, refer to "Adding, Updating, Deleting and Printing Employee Records" on page 120.

Displaying Education Summaries

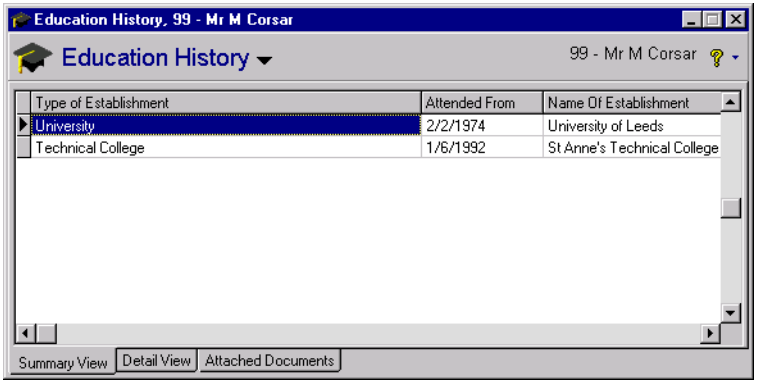
1. Navigate to the record of the employee for whom you want to display education data.
2. Do one of the following.

- On the Training and Education Shortcut bar, click the Education History button.

  – or –

- From the Screen menu, select Open Screen. Select Education History and then click OK.

3. Click the Summary View tab, if it is not already displayed.



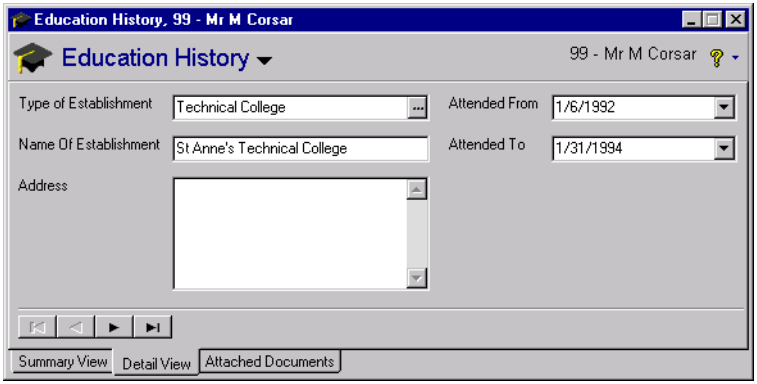
The screen shows all the educational establishments attended and the dates of attendance. To enter employee qualifications, see "Qualifications" on page 244.

Adding/Editing Education Details

Use this screen to add, edit, or delete educational records for the current employee.

1. Do one of the following:

- To add a record, click the New button on the Record toolbar, or press Ctrl+N.
- To update a record, on the Education Summary View tab, select the record you want to work with and click the Detail View tab or double-click the record.



Data Entered on This Screen

Type of Establishment. The type of establishment attended, such as School, College or University.

Name of Establishment. The name of the establishment attended (for example, The University of Hertfordshire).

Address. The address of the establishment attended. Press the Enter key to move to the next address line.

Attended From. The date from which the establishment was attended.

Attended To. The date on which the employee left the establishment.

Emergency Contacts

You can keep the details of individuals who may be contacted in the event of an emergency. These individuals may be the husband, wife or other individuals. You can keep the details of two contacts for each employee.

For detailed instructions for adding, editing and deleting records, refer to “Adding, Updating, Deleting and Printing Employee Records” on page 120.

Displaying Emergency Contact Details

1. Navigate to the record of the employee for whom you want to display emergency data.

2. Do one of the following.
   - On the Employee Shortcut bar, click the Emergency Contacts button.

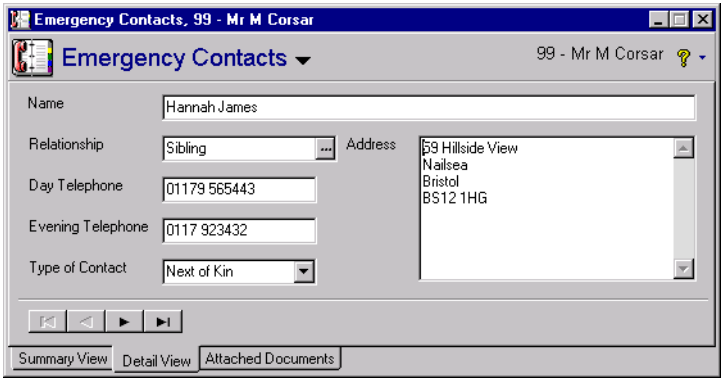
     – or –

   - From the Screen menu, select Open Screen. Select Emergency Contacts and then click OK.
3. Click the Summary View tab, if it is not already displayed.

   The Emergency Contact Summary screen lists all of the employee's emergency contacts.

Adding/Editing Emergency Contact Details

1. Do one of the following:
   - To add a record, click the New button on the Record toolbar, or press Ctrl+N.
   - To update a record, on the Emergency Contact Summary View tab, select the record you want to work with and click the Detail View tab or double-click the record.



Data Entered on This Screen

Name. The name of the contact.

Relationship. The relationship of the contact to the employee (such as Husband, Wife, Mother, Father).

Day Telephone. The daytime telephone number at which the contact can be reached.

Evening Telephone. The evening telephone number at which the contact can be reached.

Type of Contact. Select either Next of Kin or Second Contact from the drop-down list.

Address. The contact's postal address.

Employee Images

You may want to link scanned images, such as driver's licences and sample employee signatures to employee records. These files must be stored as bitmap (.BMP) images.

Displaying Employee Images

1. Navigate to the record of the employee for whom you want to display images.
2. Do one of the following:

   - On the Employee Shortcut bar, click the Employee Images button.

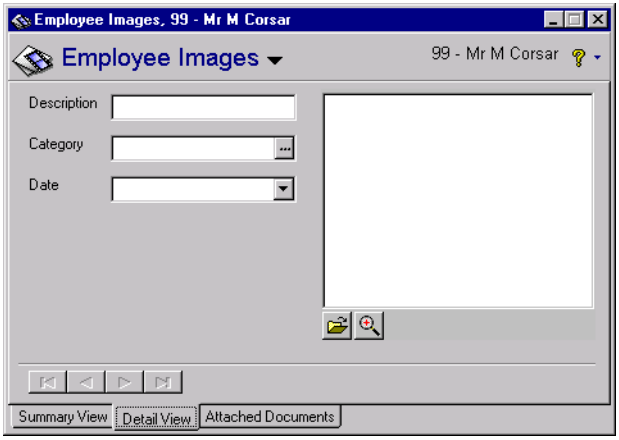
     – or –

     From the Screen menu, select Open Screen. Select Employee Images and then click OK.
3. Click the Summary View tab, if it is not already displayed.

Adding/Editing Employee Images

1. Do one of the following:

   - To add a record, click the New button on the Record toolbar, or press Ctrl+N.
   - To update a record, on the Employee Images Summary View tab, select the record you want to work with and click the Detail View tab or double-click the record.



Data Entered on This Screen

Description. Type a description of the image.

Category. Select a category to identify the image or add one to the list.

Date. Enter the effective date or select it from the calendar.

Image: Click the Open File button. Locate the image to load, and click Open. The image appears in the box on the right.

***Note**: Click the Actual Size button to view the actual size of the image.*

Employee Notes

You can store any number of notes about an employee's record. Use the Employee Notes function for storing information that is not relevant to any of the other Personnel Director screens.

For detailed instructions for adding, editing and deleting records, refer to "Adding, Updating, Deleting and Printing Employee Records" on page 120.

Displaying Employee Notes Summaries

1. Navigate to the record of the employee for whom you want to display employee notes.
2. Do one of the following.

   - On the Employee Shortcut bar, click the Notes button.

     – or –

   - From the Screen menu, select Open Screen. Select Employee Notes and then click OK.
3. Click the Summary View tab, if it is not already displayed.

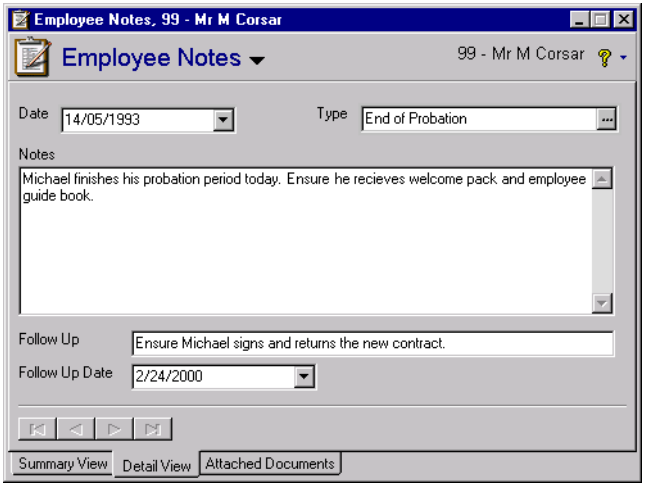
   The Employee Notes Summary screen displays a list of all the notes entered for the current employee.

Adding/Editing Employee Notes Details

Use the Employee Notes screen to store information that is not relevant to any of the other Personnel Director screens.

1. Do one of the following:

   - To add a record, click the New button on the Record toolbar, or press Ctrl+N.
   - To update a record, on the Employee Notes Summary View tab, select the record you want to work with and click the Detail View tab or double-click the record.



Data Entered on This Screen

Date. The date of the event being noted in this notes record.

Type. The type of note (such as meetings, reviews).

Notes: A free-format text field to enter the details of the note.

Follow Up. A summary of any follow-up arrangements relating to the note.

Follow Up Date. A future date by which the follow-up activity relating to this note must be completed. This field is linked to the Diary, and if required, a diary reminder for this date can be created with the follow up text (see "Setting Diary Reminder Preferences" on page 81).

Employee Photographs

You can attach photographs to an employee's record. This function assumes that you have a copy of the photograph held digitally on the computer.

Note: *The photograph must be in .JPEG graphic format.*

Displaying and Attaching Employee Photographs

1. Navigate to the record of the employee whose picture you want to see or attach.
2. Do one of the following:

- On the Employee Shortcut bar, click the Employee Photographs button.

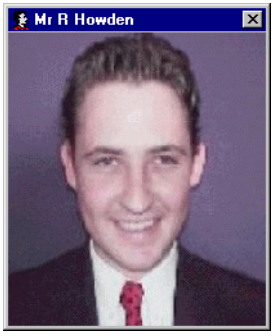
  – or –

- From the Screen menu, select Open Screen. Select Employee Photographs and then click OK.

  -or

- From the Employee Details screen, click the Employee Details button in the upper left corner.

The frame appears; it contains the picture that was previously attached, if there was one.



3. To attach an image, do the following:

- Click the New button on the Record toolbar.
- In the Load Photograph dialog, use the file list dialog to select the required image, then click the Open button.

4. To detach an image, do the following:

- Click the Delete button on the Record toolbar.
- Click Yes to confirm that you want to detach this photograph.

Note: *To update a picture, first detach the old picture, then attach the new picture.*

5. To close the photograph window, click the Window close button.

Employment History

You can keep a detailed record of an employee's employment record prior to joining your organisation. You record his/her past employers, the time they worked there, job title, salary and reason for leaving.

For detailed instructions for adding, editing and deleting records, refer to "Adding, Updating, Deleting and Printing Employee Records" on page 120.

Displaying Employment History Summaries

1. Navigate to the record of the employee for whom you want to display employment history data.
2. Do one of the following.

   - On the Employment Shortcut bar, click the Employment History button.

     – or –

   - From the Screen menu, select Open Screen. Select Employment History and then click OK.
3. Click the Summary View tab, if it is not already displayed.

   The Employment History Summary screen lists the employee's employment history, prior to joining your organisation.

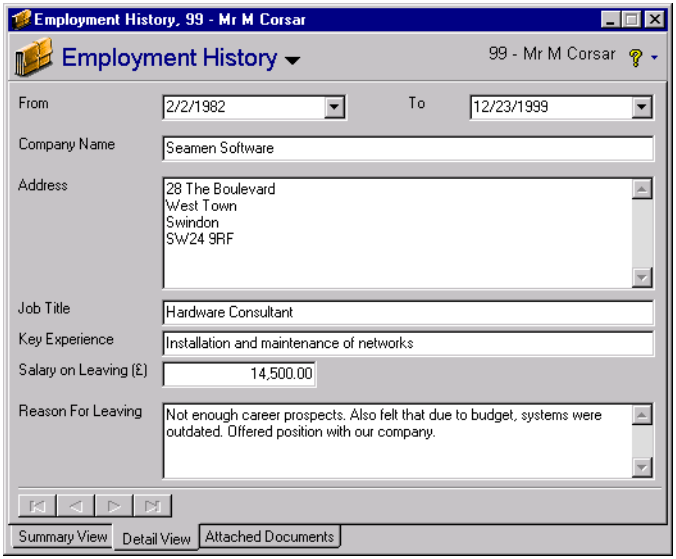
Adding/Editing Employment History Details

Use this screen to add, edit, or delete employment records for the current employee.

1. Do one of the following:

   - To add a record, click the New button on the Record toolbar, or press Ctrl+N.

- To update a record, on the Employment History Summary View tab, select the record you want to work with and click the Detail View tab or double-click the record.



Data Entered on This Screen

From. The date on which the employee joined the company in question.

To. The date on which the employee left the company in question.

Company Name. The name of the employee's previous employer.

Address. The postal address of the employee's previous employer.

Job Title. The employee's previous job title/ occupation (such as Senior Programmer).

Key Experience. These are the employee's key skills or experience relating to their previous job (for example, a computer programmer might have key experience in Assembler, C++, Java / J++ languages). See also the Skills screen for entering current experience.

Salary on Leaving. The employee's salary on leaving this employer.

Reason for Leaving. The reason why the employee left their company (such as redundancy, career change).

Exit Interview

It is good practise to conduct an interview with every employee who leaves the organisation. You can use this interview to identify the employee's reason for leaving, which then can be analysed using the Report Writer. You can store one exit interview per employee, the most current one, in Personnel Director.

For detailed instructions for adding, editing and deleting records, refer to "Adding, Updating, Deleting and Printing Employee Records" on page 120.

Displaying Exit Interview Details

1. Navigate to the record of the employee for whom you want to display exit interview data.
2. Do one of the following.

   - On the Employment Shortcut bar, click the Exit Interview button.

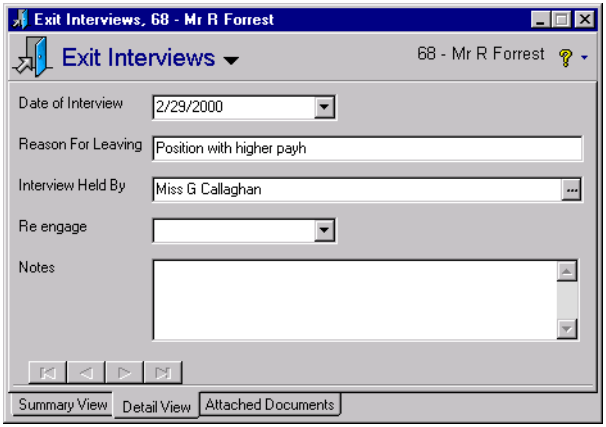
     – or –

   - From the Screen menu, select Open Screen. Select Exit Interview and then click OK.
3. Click the Summary View tab, if it is not already displayed.

Adding/Editing Exit Interview Details

1. Do one of the following:

   - To add a record, click the New button on the Record toolbar, or press Ctrl+N.
   - To update a record, on the Exit Interviews Summary View tab, select the record you want to work with and click the Detail View tab or double-click the record.



Data Entered on This Screen

Date of Interview. The date on which the interview took place.

Reason for Leaving. The reason why the employee is leaving the organisation. This field is particularly important for reporting purposes, as it helps you analyse why employees leave your organisation.

Interview Held By. The individual who held the interview with the employee. Use the Pick List for this field to ensure that your data is consistent and your reports are accurate.

Re engage. Select either Yes or No as to whether your organisation should re-employ the individual, should the employee apply for work at your organisation in the future.

Notes. A free-format notes field for any comments that you may have.

Maternity

You can record information about maternity pay periods, dates of confinement, return to work, and related information.

For detailed instructions for adding, editing and deleting records, refer to “Adding, Updating, Deleting and Printing Employee Records” on page 120.

Displaying Maternity Summaries

1. Navigate to the record of the employee for whom you want to display maternity data.
2. Do one of the following:
   - On the Payroll and Absence Shortcut bar, click the Maternity button.

     – or –

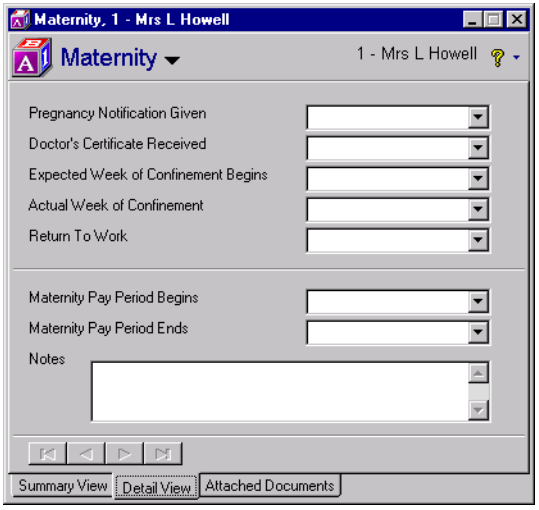
   - From the Screen menu, select Open Screen. Select Maternity and then click OK.
3. Click the Summary View tab, if it is not already displayed.

Adding/Editing Maternity Details

Use the Maternity Detail screen to add, edit, or delete employee maternity records.

1. Do one of the following:

   - To add a record, click the New button on the Record toolbar, or press Ctrl+N.
   - To update a record, on the Maternity Summary View tab, select the record you want to work with and click the Detail View tab or double-click the record



Data Entered on This Screen

Pregnancy Notification Given. The date on which the employee notified the company of the pregnancy. Select the date from the drop-down calendar.

Doctor's Certificate Received. The date on which the doctor's certificate was received by the company.

Expected Week of Confinement Begins. The date on which the employee expects confinement to begin.

Actual Week of Confinement. The actual week on which confinement began.

Return to Work. The date on which the employee returned to work.

Maternity Pay Period Begins. The date on which maternity pay begins.

Maternity Pay Period Ends. The date on which maternity pay ends.

Notes. Enter any free form notes about the maternity information.

Medical History

You can record information about an employee's medical examinations and their outcome and record the date of the next scheduled medical examination.

For detailed instructions for adding, editing and deleting records, refer to "Adding, Updating, Deleting and Printing Employee Records" on page 120.

Displaying Medical History Summaries

1. Navigate to the record of the employee for whom you want to display medical history data.
2. Do one of the following.
   - On the Employment Shortcut bar, click the Medical History button.

     – or –

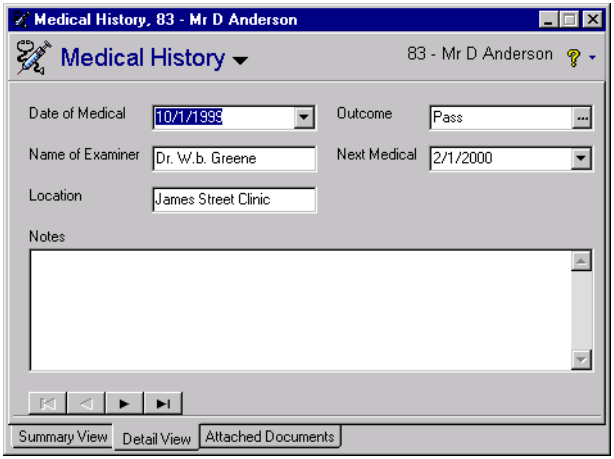
   - From the Screen menu, select Open Screen. Select Medical History and then click OK.
3. Click the Summary View tab, if it is not already displayed.

Adding/Editing Medical History Details

Use the Medical History Detail screen to add, edit or delete employee medical history records.

1. Do one of the following:

   - To add a record, click the New button on the Record toolbar, or press Ctrl+N.
   - To update a record, on the Medical History Summary View tab, select the record you want to work with and click the Detail View tab or double-click the record.



Data Entered on This Screen

Date of Medical. The date on which the medical appointment occurred. The format depends upon your Windows settings (see "Setting the Date Format Used by Windows" on page 59).

Name of Examiner. The name of the health care practitioner who conducted the medical examination.

Location. The location where the medical examination occurred.

Outcome. The result of the medical examination. For example: passed, failed, further testing required, inconclusive. You can select from and add items to the Pick List.

Next Medical. The date on which the employee is scheduled for the next medical examination. Type the date or select it from the drop-down calendar.

Notes. A free-format notes field for you to add any information relating to the medical examination.

Pay History

You can keep a detailed record of an employee's pay history. A pay record is a wage or salary that an employee is paid for a particular period. Any changes to the employee's pay should be recorded as a new pay record, thereby maintaining a historical record. Personnel Director stores salary records in up to three currencies, including the Euro, and automatically converts local currency to Euros.

Changing a date field in a pay history record, such as the From Date, can cause a Career Event to be created and logged in the employee's career history file. For further details, refer to "Setting Career Event Preferences" on page 80.

The Holiday and Absence screen uses the pay record history to calculate the cost of employee absences to your company. The holiday and absence calculations attempt to find the pay record that was current during the period of absence, and calculate the cost of the absence.

The current pay details are also displayed on the Pay Details tab on the Employee Details screen.

For detailed instructions for adding, editing and deleting records, refer to "Adding, Updating, Deleting and Printing Employee Records" on page 120.

Displaying Pay History Summaries

1. Navigate to the record of the employee for whom you want to display pay record data.
2. Do one of the following.

   - On the Absence and Payroll Shortcut bar, click the Pay History button.

     – or –

   - From the Screen menu, select Open Screen. Select Pay History and then click OK.
3. Click the Summary View tab, if it is not already displayed.

   The Pay History Summary screen provides an overview of the employee's complete pay history with your company.

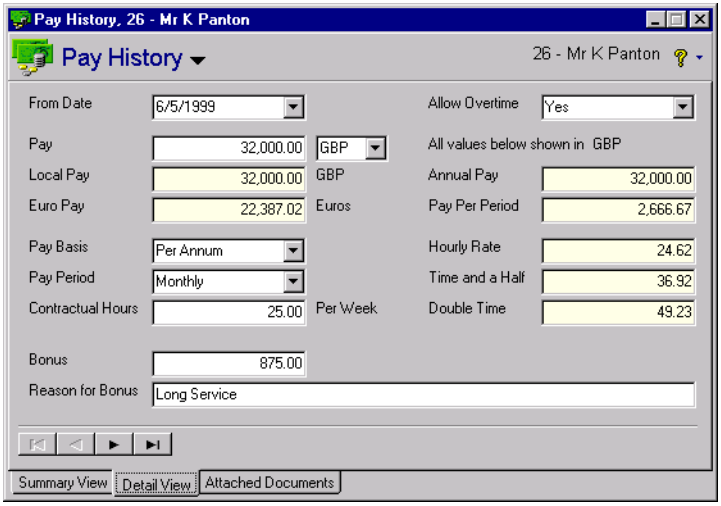
Only one pay record is considered to be current at any particular time. The current record is the pay record whose 'From Date' is closest to, but not greater than, the current date on your computer.

Adding/Editing Pay Record Details

Use this screen to add, edit, or delete pay records for the current employee.

1. Do one of the following:

- To add a record, click the New button on the Record toolbar, or press Ctrl+N.
- To update a record, on the Pay History Summary View tab, select the record you want to work with and click the Detail View tab or double-click the record.



Data Entered on This Screen

From Date. The date on which the pay record comes into effect. This is used to determine the current pay record to display on the Pay Details tab on the Employee Details screen. It is also used to calculate the cost of an employee absence. The current pay record is the pay record whose 'From Date' is closest to, but not greater, than the current date on your computer.

You can use this feature to enter future pay records which will automatically come into effect as the date changes on your computer.

Pay. The gross amount of pay the employee receives (excluding National Insurance and other on costs), on a pay unit basis, as set under Pay Basis (see below). You can change the currency used to calculate and display gross pay by selecting a currency from the drop-down list. The Local Pay and pay in Euros is automatically recalculated when you save the record.

Currency. The Local Currency defined in the Currency Exchange Rates screen accessed from the Company menu.

Local Pay. The pay converted to the local currency as defined on the Currency Exchange Rates screen.

Euro Pay. The pay in Euros.

Pay Basis. Select Per Annum, Per Day, Per Hour, Per Month, Per Shift, or Per Week from the drop-down list, to indicate how the employee is paid. Changing this field will change the amounts calculated in the fields on the right side of the screen.

Pay Period. How often the employee is paid - Weekly, 2 Weekly, 4 Weekly, or Monthly.

Contractual Hours. The hours normally worked by the employee in a week. This is used when calculating absence costs and the various pay calculated fields (see "Calculated Fields" below).

Allow Overtime. Indicate whether or not the employee is allowed to work overtime. If you select Yes, then additional calculated fields appear on the right of the screen, displaying the equivalent time-and-a-half and double-time rates based on the gross pay details entered.

Bonus. Enter the amount of an annual bonus awarded to the employee.

Reason for Bonus. Enter the reason for awarding a bonus.

Calculated Fields

The following data is calculated automatically by Personnel Director, based on the pay details entered. All calculated field values are expressed in the Local Currency defined on the Currency Exchange Rates screen accessed from the

Company menu. For more information on pay and pay period calculations, see "Understanding Pay Period Calculations" on page 597.

Annual Pay. Gross annual pay based on the Pay and Pay Basis entries.

Pay Per Period. The pay per Pay Period selected.

Hourly Rate. The employee's hourly rate based upon the Pay and Contractual hours entered.

Time And A Half. The employee's hourly rate multiplied by 1.5. You can see how much it would cost your company to pay the employee overtime.

Double Time. The employee's hourly rate multiplied by 2. You can see how much it would cost your company to pay the employee overtime.

Professional Memberships

You can record information about professional associations to which employees belong.

For detailed instructions for adding, editing and deleting records, refer to "Adding, Updating, Deleting and Printing Employee Records" on page 120.

Displaying Professional Membership Summaries

1. Navigate to the record of the employee for whom you want to display professional membership data.
2. Do one of the following:

   - On the Training and Education Shortcut bar, click the Professional Membership button.

     – or –

   - From the Screen menu, select Open Screen. Select Professional Membership and then click OK.
3. Click the Summary View tab, if it is not already displayed.

   The Professional Membership screen displays the professional associations or organisations to which the employee has belonged while employed by your company.

Adding/Editing Professional Membership Details

Use the Professional Membership Detail screen to add, edit, or delete professional membership records.

1. Do one of the following:

- To add a record, click the New button on the Record toolbar, or press Ctrl+N.
- To update a record, on the Professional Membership Summary View tab, select the record you want to work with and click the Detail View tab or double-click the record.

Data Entered on This Screen

Date Admitted. The date on which the employee became a member of the organisation.

Organisation. The name of the organisation. You can select from or add items to the Pick List.

Membership Type. For example, Associate, Student, or Full. You can select from or add items to the Pick List.

Designation. Professional designation. For example, CGA or RN.

Annual Fee. Annual membership fee.

Renewal Date. The date on which the membership is due for renewal.

Notes. A free-format text field to enter the details of the note.

Company Pays Fees. Click this checkbox if the company pays the employee's membership fees.

Project Timesheets

You can create weekly timesheets to track employee's time spent on projects and activities. (To track non-project specific time, see "Managing Working Time Regulations" on page 251.) The timesheet displays the number of overtime hours worked in the week and on weekends. The overtime hours calculations are based on the contractual hours per week on the current Pay History record.

Personnel Director provides standard reports to analyse timesheet data — time spent on projects and activities.

For detailed instructions for adding, editing and deleting records, refer to "Adding, Updating, Deleting and Printing Employee Records" on page 120.

Displaying Project Timesheet Summaries

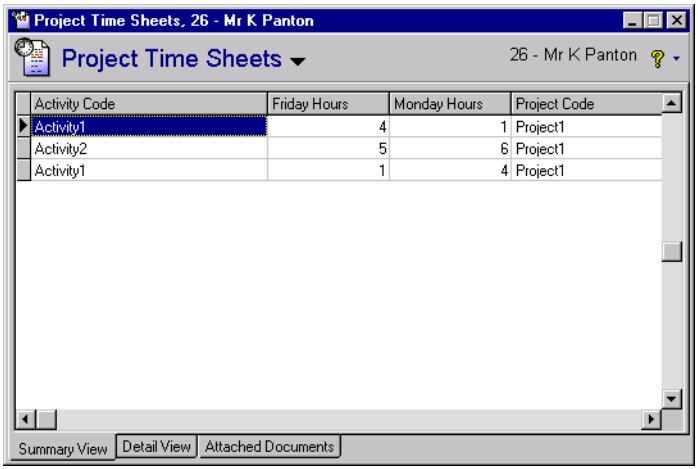
1. Navigate to the record of the employee for whom you want to display timesheets.
2. Do one of the following.

- On the Absence and Payroll Shortcut bar, click the Project Time Sheets button.

  – or –

- From the Screen menu, select Open Screen. Select Project Time Sheets and then click OK.

3. Click the Summary View tab, if it is not already displayed.

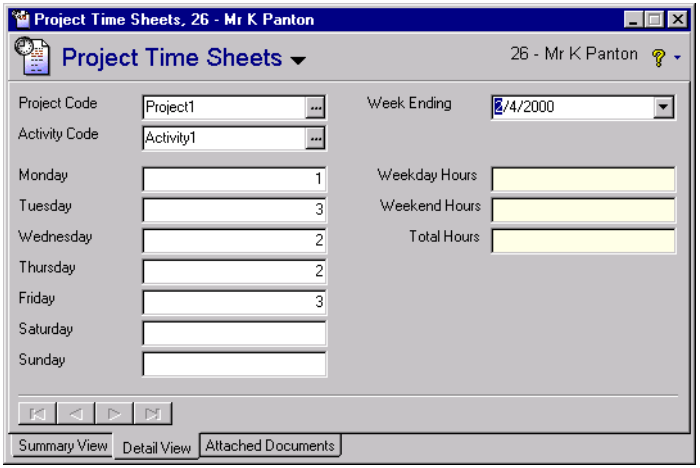


Adding/Editing Project Timesheet Details

Use the Project Time Sheets detail screen to add, edit, or delete timesheet records for the current employee.

1. Do one of the following:

- To add a record, click the New button on the Record toolbar, or press Ctrl+N.
- To update a record, on the Project Timesheet Summary View tab, select the record you want to work with and click the Detail View tab or double-click the record.



Data Entered on This Screen

Project Code. The code of the project that the overtime hours are being logged to. Use this code to record and analyse the time spent on any number of projects.

Activity Code. The code for the type of activity performed on the project.

Monday, Tuesday, Wednesday, Thursday, Friday. The hours spent each day of the week working on the project and activity.

Week Ending. The Friday of the week for which you are creating the timesheet. Select the date from the drop-down calendar.

Calculated Fields

There are three calculated fields on the right side of the Time Sheets Details screen:

Weekday Hours. The number of weekday overtime hours worked. Any hours worked in excess of the contractual hours on the current Pay History record are considered to be overtime. For example, if the current contracted hours are 37 and the employee has worked 40 hours Monday to Friday, then 3 hours is calculated as overtime.

Weekend Hours. The total hours worked at weekends for the week.

Total Hours. The total number of hours worked in the timesheet week. This is the sum of the hours worked Monday to Sunday for each Project Code and Activity Code.

Training History

You can build a detailed history of any training undertaken by an employee, specifying course details, costs, and outcomes.

For detailed instructions for adding, editing and deleting records, refer to "Adding, Updating, Deleting and Printing Employee Records" on page 120.

Note: *The distinction between the data contained in Education History and Training History. Education data generally relates to academic qualifications gained prior to joining the company, whereas training generally refers to courses undertaken while employed by your company.*

Displaying Training Summaries

1. Navigate to the record of the employee for whom you want to display training data.
2. Do one of the following:

   - On the Training and Education Shortcut bar, click the Training History button.

     – or –

   - From the Screen menu, select Open Screen. Select Training History and then click OK.
3. Click the Summary View tab, if it is not already displayed.

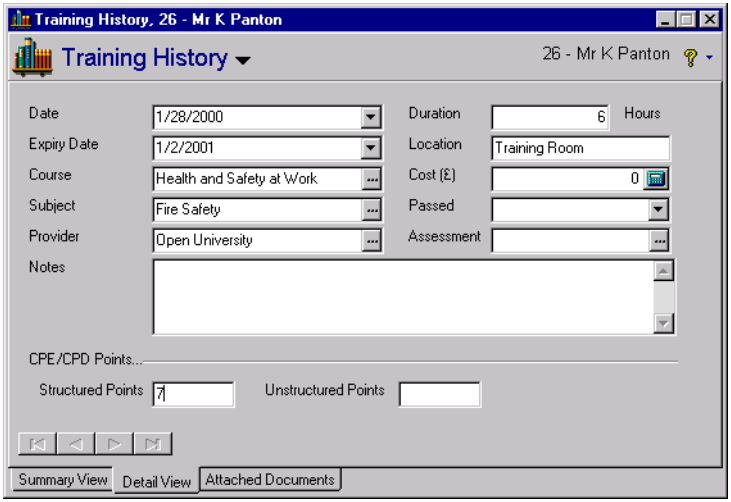
   The Training Summary screen displays all the training courses that the current employee has attended whilst being employed by your company. The training cost and CPE/CPD points are used to update the CPE/CPD points and Training Budget values on the CPE/CPD Record screen. See "Qualifications" on page 244.

Adding/Editing Training Details

Use the Training History detail screen to add, edit, or delete training records for the current employee.

1. Do one of the following:

- To add a record, click the New button on the Record toolbar, or press Ctrl+N.
- To update a record, on the Training History Summary View tab, select the record you want to work with and click the Detail View tab or double-click the record.



Data Entered on This Screen

Date. The date of the course.

Expiry Date. The date on which the training expires and is due for renewal. This field is automatically linked to the diary so that reminders are displayed when employees need re-training.

Course. The title of the course.

Subject: The main subject matter of the course undertaken.

Provider. The name of the individual or organisation providing the course.

Duration. The duration, in hours, of the course.

Location. The location where the course was held.

Cost. The cost of attending the course.

Passed. Whether the course was completed successfully.

Assessment. Was the course assessed and what were the results?

Notes. A free-format notes field in which you can enter further details of the course undertaken, such as a candidate's feedback.

CPE/CPD Points

Structured Points. If the course or training was structured training that you want recorded on the CPE/CPD Records screen, enter the number of structured points awarded.

Unstructured Points. If the training was unstructured training that you want recorded on the CPE/CPD Records screen, enter the number of unstructured points awarded.

Qualifications

Qualifications are the specific educational qualifications attained by the employee at the establishments they attended. Qualifications are made up of the level attained in each grade and subject.

For detailed instructions for adding, editing and deleting records, refer to "Adding, Updating, Deleting and Printing Employee Records" on page 120.

Displaying Qualifications Summaries

1. Navigate to the record of the employee for whom you want to display training data.
2. Do one of the following.

- On the Training and Education Shortcut bar, click the Qualifications button.

  – or –

- From the Screen menu, select Open Screen. Select Qualifications and then click OK.

3. Click the Summary View tab, if it is not already displayed.

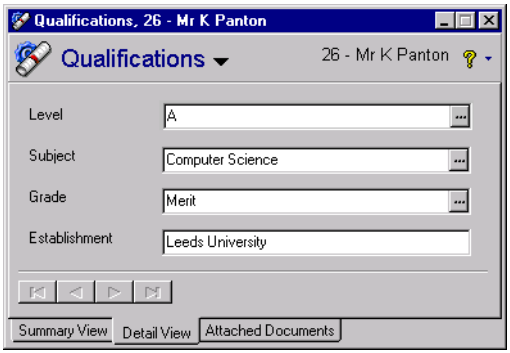
   The Qualifications Summary screen displays all the levels attained in each subject and grade at the establishments that the current employee has attended.

Adding/Editing Qualifications Details

Use the qualifications detail screen to add, edit, or delete qualifications for the current employee.

1. Do one of the following:

   - To add a record, click the New button on the Record toolbar, or press Ctrl+N.
   - To update a record, on the Qualification Summary View tab, select the record you want to work with and click the Detail View tab or double-click the record.



Data Entered on This Screen

Level. The level; for example, O, A, First Degree, MSc or PhD

Subject. The subject; for example, Chemistry, Engineering or Psychology.

Grade. The grade; for example, A, B, C, 1:1 or 2:1.

Establishment. School or university name.

Skills

You can use the Skills screens to track the skills of individual employees. Skill records are important because they enable you to search for an employee having particular skills. A set of Skills Reports are provided with Personnel Director, and are available from the list of reports in the Personnel Director Report List (see chapter 13 "Working with Personnel Director Report List" on page 297).

For detailed instructions for adding, editing and deleting records, refer to "Adding, Updating, Deleting and Printing Employee Records" on page 120.

Displaying Skills Summaries

1. Navigate to the record of the employee for whom you want to display skills data.
2. Do one of the following.

   - On the Training and Education Shortcut bar, click the Skills button.

     – or –

   - From the Screen menu, select Open Screen. Select Skills and then click OK.
3. Click the Summary View tab, if it is not already displayed.

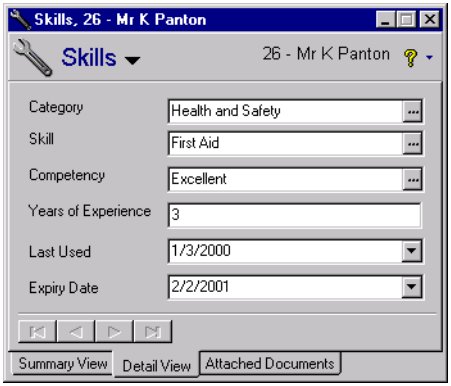
   The Skills Summary screen lists all the employee's skills.

Adding/Editing Skills Details

Use this screen to add, edit, or delete skills records for the current employee.

1. Do one of the following:

   - To add a record, click the New button on the Record toolbar, or press Ctrl+N.
   - To update a record, on the Skills Summary View tab, select the record you want to work with and click the Detail View tab or double-click the record.



Data Entered on This Screen

Category. The employee's main skills area (such as Programming, French Language). Standard skill areas can be defined using the Pick List.

Skill. The employee's particular skill within the Category of skills (for example, a Computer Programmer may have C++ skills).

Competency. The employee's skill level or competence. You may choose to grade it as follows: Expert, Good, Fair, or 1, 2, 3.

Years of Experience. The number of years experience in the skill.

Last Used. The date on which the employee last used the skill.

Expiry Date. The date on which the competency in the skill expires. This date is automatically linked to the Personnel Director diary.

Vehicle Usage

You can keep a list of company cars within your organisation. The Company Car Use screens are then used to log the use of any of these vehicles against an employee's record. Before you can use these screens, the details of company cars must have been entered on the Company Cars screen, as described in "Entering Company Vehicle Data" on page 75.

For detailed instructions for adding, editing and deleting records, refer to "Adding, Updating, Deleting and Printing Employee Records" on page 120.

Displaying Vehicle Usage Summaries

1. Navigate to the record of the employee for whom you want to display company car use data.
2. Do one of the following.

   - On the Employee Shortcut bar, click the Vehicle Usage button.

     – or –

   - Select Vehicle Usage from the Employee menu.

3. Click the Summary View tab, if it is not already displayed.

   The Vehicle screen displays the current employee's history of company car use. The date of use, car registration, total miles driven and type of use (personal or business) is displayed. This screen contains all of the standard summary screen toolbar buttons and related functions (described in "Summary Screens" on page 113).

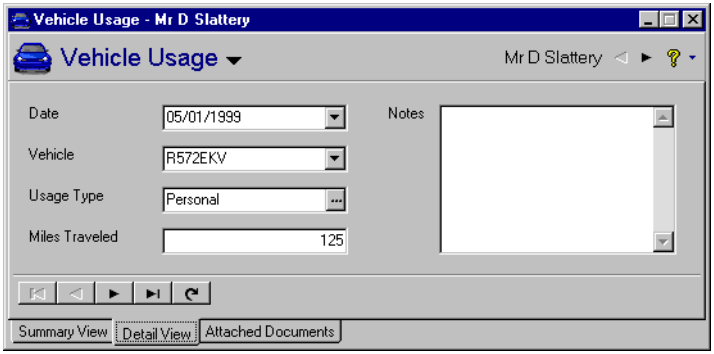
Adding/Editing Vehicle Usage Details

Use the Vehicle Usage screen to add, edit, or delete records for the current employee's use of company cars.

1. Do one of the following:

   - To add a record, click the New button on the Record toolbar, or press Ctrl+N.

- To update a record, on the Vehicle Usage Summary View tab, select the record you want to work with and click the Detail View tab or double-click the record



Data Entered on This Screen

Date. Enter the date when the vehicle was used, or click the Calendar button and select the date.

Vehicle. Select the vehicle from the list of vehicles (as entered on the Company Vehicles screen).

Usage Type. Select the type of use (Business or Personal). You can add additional types to the Pick List.

Miles Traveled. Type the total mileage.

Notes. Type any notes about the vehicle usage.

10 MANAGING WORKING TIME REGULATIONS

This chapter outlines how you can use Personnel Director to track Working Time data. If you want information on how to track employee time for specific projects, see "Project Timesheets" on page 239.

The EU Directive on Working Time came into effect in the UK on 1st October 1998. The Working Time Regulations (as the Directive became known when it became law) require employers to maintain records specifically relating to employee working times. Personnel Director is designed to help you manage this data.

The Regulations affect the following for some or all of the employees:

- Working hours
- Rest periods
- Annual leave
- Health assessments for night workers

Some professions are exempt from the Regulations and the qualification for exemption has changed a number of times since the Regulations became law. Please contact your local employment office for current information.

Within Personnel Director, you can track key data relating to each employee, send 'opt out letters', maintain detailed records of working hours, and generate Working Time reports. In addition, the Employers' Guide to HR that is available to supported users contains helpful information on the Working Time regulations. (Click the HR Guide button on the toolbar to access www.vizual.co.uk/employers-guide.asp to obtain Working Time information.)

Note: *The rules for Working Time may vary from country to country. The guidance included in Personnel Director is based on current UK legislation. This varies from regulations in place in Ireland, Isle of Man and Channel Islands. Please contact your local Employment Office for further information.*

Vizual Business Tools also produces Working Time Tracker, a specialist product designed for workplace time recording. Working Time Tracker allows

users to collect employee work times across a Windows NT network or by using dedicated data capture terminals. For further information and pricing call the Vizual sales line on 0181 249 6044 or look us up on the Internet at www.vizualbusinesstools.com

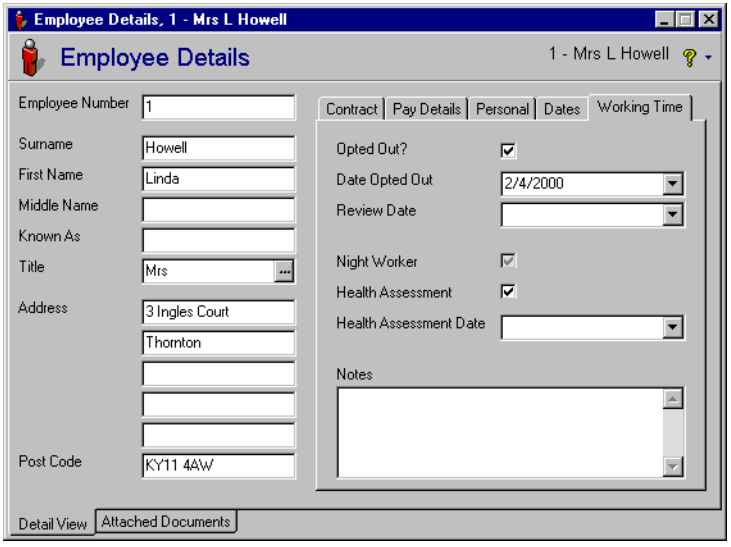
Tracking Employee Working Time Data

Tracking Employee Working Time data involves the following activities:

- Adding key Working Time information when the employee joins the company. If necessary, print the Working Time Opt Out cover letter and agreement.
- Creating, distributing and completing timesheets on a scheduled basis.
- Viewing and printing Working Time reports for management and reporting purposes.

Adding Key Working Time Information for New Employees

When an employee joins the company, you record his or her information using the Employee Details screen. The Working Time tab of this screen contains fields that enable you to record key Working Time dates and other relevant information.



Be sure to fill in the following Working Time Regulations fields:

Opted Out? If the employee has signed a letter opting out of the Working Time Regulations, select this checkbox.

Date Opted Out. The effective date that the employee opted out of the Working Time regulations.

Review Date. The date on which the employee's status under Working Time Regulations will be reviewed.

Night Worker. If the employee is required to work nights, select this checkbox.

Health Assessment. If the employee has had a health assessment related to working nights, select this checkbox.

Health Assessment Date. Select the date of the employee's health assessment from the drop-down calendar.

Notes. Notes about the employee's Working Time Regulations status.

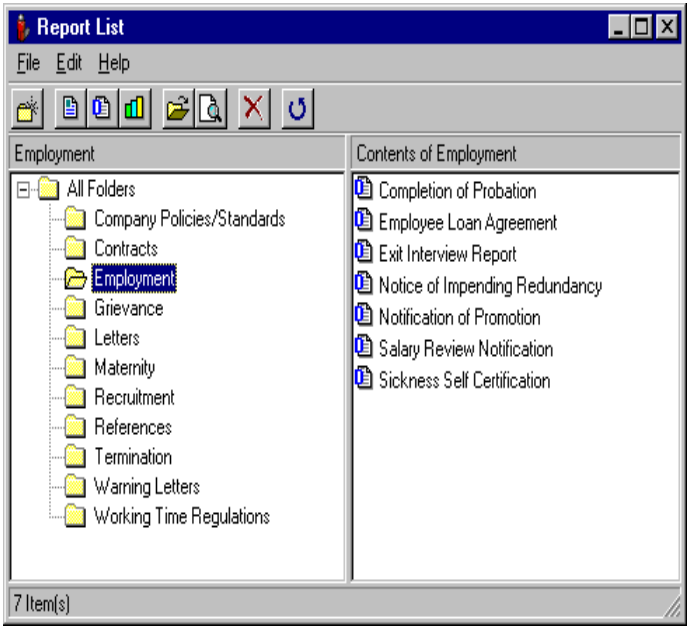
For complete instructions on how to add new employees, see "Creating New Employee Records" on page 149.

Under the Regulations, employees can agree to waive their rights under the legislation. However, to do so they must sign an 'opt out' agreement indicating that their agreement to opt out and their awareness of the implications of doing so. Personnel Director comes with a standard opt out agreement along with a covering letter explaining the purpose of the opt out agreement.

To print a Working Time Opt Out letter or agreement:

1. Click the Letters button on the toolbar.

The Report List appears.



- Double-click the Letters folder.
- Double-click the Working Time Regulations subfolder.

In Personnel Director Report List, all letters, faxes, and memos are stored in the Letters folder in subfolders according to their subject matter. For additional details on how to use Report List, see chapter 13 "Working with Personnel Director Report List" on page 297.

2. Double-click the Working Time Opt Out Covering Letter or the Working Time Agreement.

   To generate and print the document, follow the instructions on the screens. For more detailed instructions, see "Writing Other Documents" on page 311.

Managing Employee Timesheets

Personnel Director comes with a comprehensive Working Time timesheet for recording employee start and finish times. There are two methods that you can use to collect timesheet data.

Depending on the procedures in your organisation, use either one or a combination of both:

- Centralised Data Entry
- Distributed Data Entry

With Centralised Data Entry, you create and print timesheets on a scheduled basis using the Working Time Directive function in Personnel Director. After employees fill in and return the paper copies of the timesheets, you can then update the timesheets in Personnel Director by recording the data using Working Time Directive.

With Distributed Data Entry, there are two options.

- You create and print timesheets on a scheduled basis using the Working Time Directive function in Personnel Director. Employees then use Working Time Directive in Personnel Director to modify the timesheet by filling in their hours.
- You create and export timesheets using the Working Time Directive module in Personnel Director. (You can export timesheets into a variety of spreadsheet and text formats.) Have employees record their hours by updating the timesheet file using the appropriate spreadsheet or text editor. When the timesheet file is returned to you, update the timesheet in the Working Time Directive in Personnel Director by importing the file and saving the data.

Viewing and Printing Working Time Reports

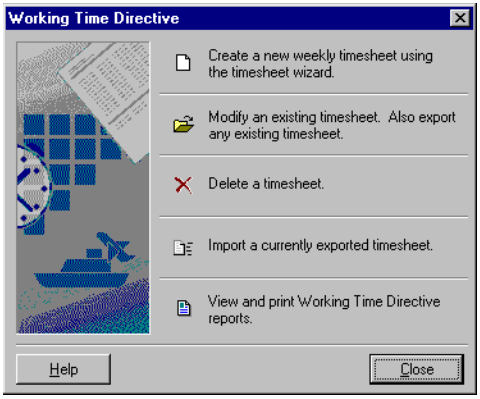
In addition to printing individual Working Time timesheets, you can also view or print a number of standard Working Time reports including the '17 Week Rolling Average' report. For special reporting requirements, you can use Working Time data to customise your own report (see "Creating New Reports" on page 390).

Starting the Working Time Directive

To start the Working Time Directive:

1. From the Tools menu, select Working Time Directive.

   The Working Time Directive menu appears.


Working Time Directive
Create a new weekly timesheet using the timesheet wizard.
Modify an existing timesheet. Also export any existing timesheet.
Delete a timesheet.
Import a currently exported timesheet.
View and print Working Time Directive reports.
Help
Close

2. Perform one of the following actions:

- Create a timesheet. See "Creating a Timesheet" on page 257.

- Modify or export a timesheet. To update a timesheet, see "Modifying a Timesheet" on page 266. To export a timesheet, see "Importing and Exporting Timesheets" on page 267.

- Delete a timesheet. See "Deleting a Timesheet" on page 266.

- Import a timesheet. See "Importing and Exporting Timesheets" on page 267.

- View or print timesheet reports. See "Printing Timesheet Reports" on page 269.

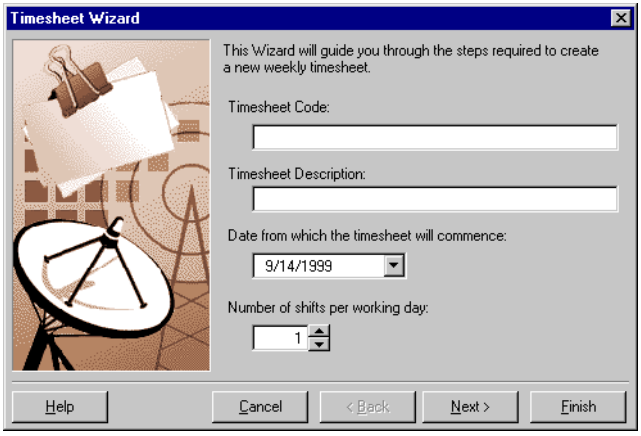
3. To exit the Working Time Directive, click the Close button.

Creating a Timesheet

To create a new timesheet:

1. On the Working Time Directive menu, click the Create Timesheet icon.

   The Timesheet Wizard appears.



2. Provide the following information:

   Timesheet Code. Type a unique code for this timesheet. The code cannot include blanks.

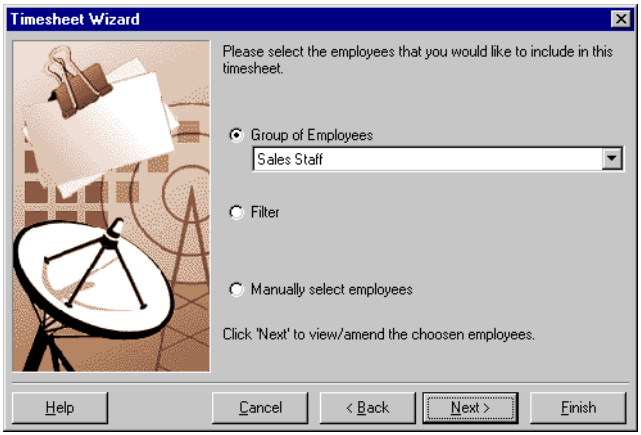
   Timesheet Description. Type a description for the timesheet.

   Date From Which The Timesheet Will Commence. Select or type the date to be recorded as the start date for this timesheet.

   Number of Shifts Per Working Day. Select the number of shifts per day to be recorded.

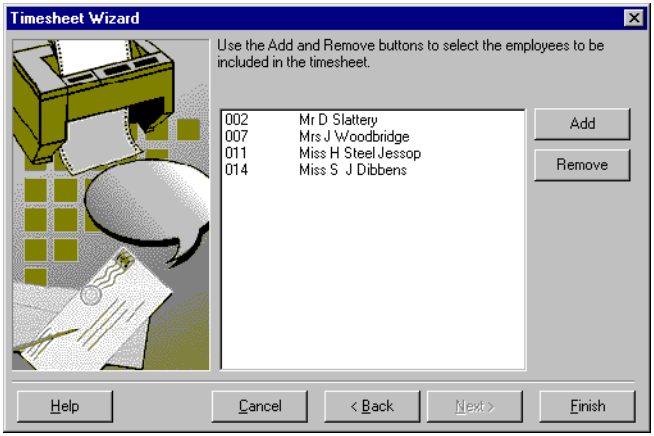
3. Click the Next button.

The second screen of the Timesheet Wizard appears.



- To include only employees belonging to a specific group, click Group Of Employees. Select the group that you want to use from the drop-down list.
- To include only employees as identified by an Employee Filter, click Filter. Select the filter that you want to use from the drop-down list.
- To include only employees you select, click Manually Select Employees.

4. Click the Next button.
5. Add or remove employees from the list.



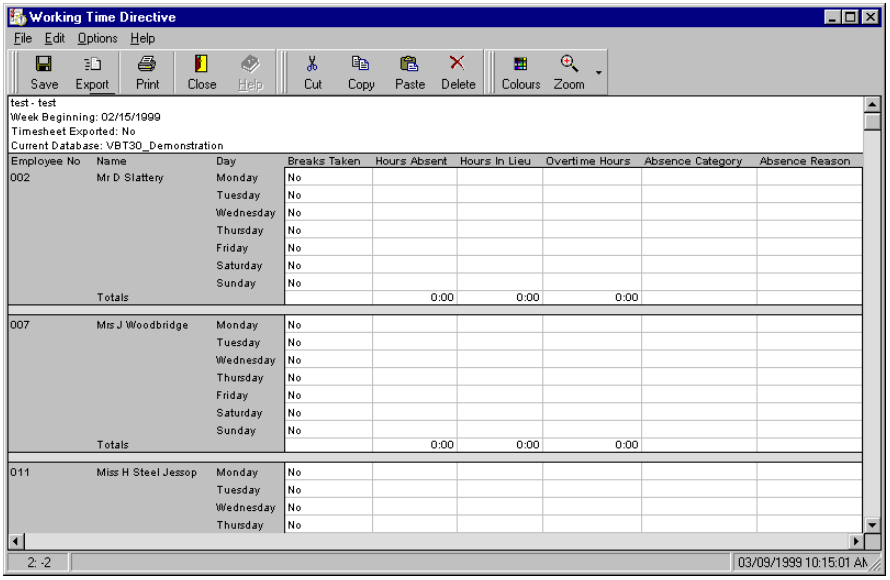
- To add one or more employees, click the Add button. Select one or more employees and click OK.
- To remove one or more employees, select the employees in the list and click the Remove button.

6. Click Finish.

   The Working Time Directive screen appears. For instructions describing how to enter timesheet data, see “Recording Working Time Directive Data” on page 264.

About the Working Time Directive Data Screen

When you create or modify a timesheet, the Working Time Directive timesheet appears.



Use this screen enter or update the data required for each individual on the timesheet. In addition to saving and printing the timesheet, you can also export it to a number of different spreadsheet and text formats for use with other applications. When the start and end times for multiple employees are the same, you can make data entry easier by using the Copy and Paste buttons or the Copy and Paste commands on the Edit menu to auto-fill the rows.

You can change the appearance of the screen by adjusting the color, level of magnification, as well as by hiding the toolbars and status bar. All settings are saved from timesheet to timesheet until you reset them.

If you are using the leave and absence functions in Personnel Director, be sure to set the desired timesheet options. For more information, see "Setting Timesheet Options" on page 263. These options also in effect from timesheet to timesheet until you change them.

Using the Working Time Directive Toolbars

Main Toolbar

The Main toolbar has buttons you use to work with the timesheet file.

Button	Menu Access	Description	Procedure	Shortcut
	File menu> Save Timesheet	Save the timesheet		Ctrl+S
	File menu> Export Timesheet	Export the timesheet		Ctrl+E
	File menu> Print	Print the timesheet		Ctrl+P
	File menu> Page Setup	Change the layout of the timesheet for printing		
	File menu> Printer Setup	Change the printer or other printer options		
	File menu> Close	Exit the Working Time Directive timesheet		
		Display help for Working Time Directive		

Edit Toolbar

The Edit toolbar has buttons you use to work with the timesheet data.

Button	Menu Access	Description	Procedure	Shortcut
	Edit menu> Cut	Cut the selected data		Ctrl+X
	Edit menu> Copy	Copy the selected data		Ctrl+C
	Edit menu> Paste	Paste the data previously cut or copied		Ctrl+V
	Edit menu> Delete	Delete the selected data		Del
	Edit menu> Refresh	Recalculate the timesheet totals.		

Options Toolbar

The Options toolbar has buttons you use to adjust the color and the level of magnification.

Button	Menu Access	Description	Procedure	Shortcut
	Options menu> Toolbars	Hide (show) the toolbars and adjust the size of the toolbar buttons.		
	Options menu> Copy	Hide (show) the status bar		
	Options menu> Change Colours	Change colours used on the timesheet screen		
	Options menu> Change zoom	Change the magnification		
	Options menu> Options	Set absence options and import/export warnings.		

Hiding/Showing Toolbars or Status Bar

To hide or show the toolbars:

- From the Options menu, select Toolbars. A checkmark indicates that toolbar is to show.

To hide or show the status bar:

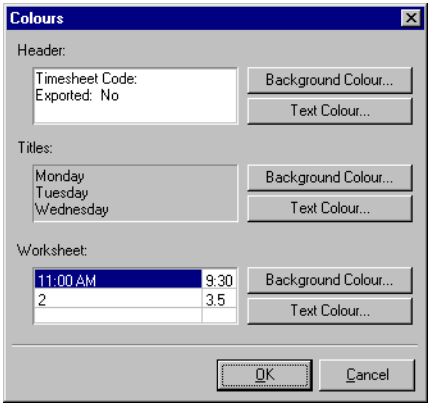
- From the Options menu, select Status Bar. A checkmark indicates that bar is to show.

Changing Timesheet Screen Colours

To make the Working Time Directive timesheet easier to work with, you can change the background and text colours used to display the header, title, and worksheet data.

1. On the Working Time Directive timesheet screen, click the Colours button or select Colours from the Options menu.

   The Colours screen appears.



2. Select either the Background Colour or Text Colour button for the Header, Title, or Worksheet data.
3. To change the colour, do one of the following and then click OK.
   - Click the colour you want from Basic Color or Custom Color.
   - To create a custom colour, click the Create Custom Color button. Click the colour matrix or type the values for the Hue, Saturation,

Luminosity, Red, Green and Blue, then click the Add To Custom Colors button. Then click OK.

4. On the Colours screen, click OK.

Changing Timesheet Magnification

You can change the level of magnification used to display the timesheet using the Zoom button or the Zoom menu item.

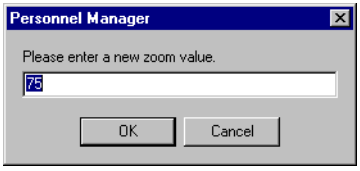
To select a preset zoom level:

1. On the Working Time Directive timesheet screen, click the down arrow to the right of the Zoom button.
2. Select the level of magnification you want.

To specify a zoom level:

1. On the Working Time Directive timesheet screen, click the Zoom button or select Zoom from the Options menu.

   The Personnel Director screen appears.



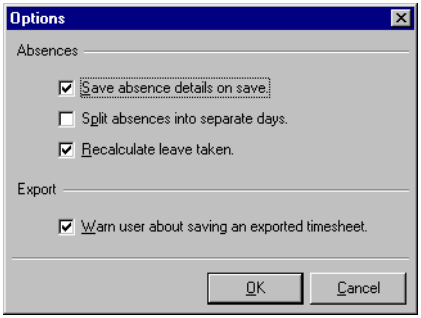
2. Type the percentage of magnification you want and click OK.

Setting Timesheet Options

You can set absence options and import/export warnings for the Working Time Directive timesheet.

1. On the Working Time Directive timesheet screen, select Options from the Options menu.

The Options screen appears.



2. To set absence options, provide the following information:

   Save Absence Details On Save. Click this checkbox if you want the absence information recorded on the timesheet to create an Absence record.

   Split Absences Into Separate Days. Click this checkbox if you want the hours absent to be calculated as separate days. For example, if an employee is ill for three days, clicking this checkbox will create an Absence record for each day the employee was absent.

   Recalculate Leave Taken. Click this checkbox if you want leave information to be recalculated for the employee in Personnel Director.

3. If you want a warning message issued when a user attempts to use a spreadsheet that has already been exported, click the Warn User About Saving An Exported Timesheet checkbox.
4. Click OK.

Recording Working Time Directive Data

Use the Working Time Directive screen to enter information for each employee on the timesheet. Notice that hours you add or change is reflected in the Planned Hours, Actual Hours and Total fields.

You can speed up data entry by copying data. For example, if the planned start and end hours are the same for all days on the timesheet:

1. Type the Planned Start and Planned End hours for Monday.
2. Select the two fields and click the Copy button.

3. Select the Planned Start and Planned End hour fields for Tuesday through Sunday and click the Paste button.

Record the following information on the timesheet:

Planned Start. Type the hour (24 hour clock) planned as the hour work is to start.

Planned End. Type the hour (24 hour clock) planned as the hour work is to end.

The number of hours planned is calculated from the Planned Start and Planned End fields and is displayed in Planned Hours.

Actual Start. Type the hour (24 hour clock) when work actually started.

Actual End. Type the hour (24 hour clock) when work actually ended.

The number of actual working hours is calculated from the Actual Start and Actual End fields and is displayed in Actual Hours.

Breaks Taken. Indicate whether or not breaks were taken. Select Yes or No.

Hours Absent: Type the number of hours the employee was absent during the time period being reported.

Hours In Lieu. Time may be given in lieu of extra pay or overtime. Enter the number of hours taken as time in lieu.

Overtime Hours. Type the number of hours overtime the employee worked during the time period being reported.

Absence Category. Select the category to which the absence is to be recorded.

Absence Reason. Select the reason why the employee was absent.

The totals for each hour column and are displayed in the Totals row.

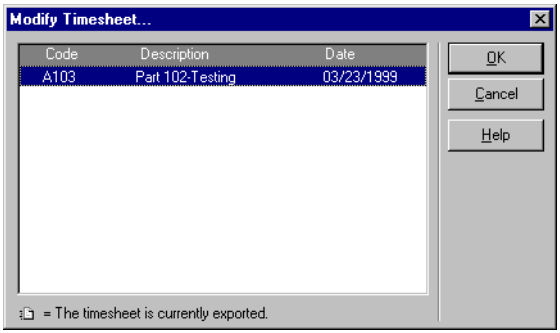
When you have finished entering the timesheet data for this job, click the Save button, select Save from the File menu, or press Ctrl+S.

Modifying a Timesheet

When necessary, you can update a timesheet you previously created.

1. On the Working Time Directive menu, click the Modify Timesheet icon.

   The Modify Timesheet screen appears.



2. Select the timesheet you want to modify and click OK.

   The Working Time Directive screen appears. For instructions describing how to record timesheet data, see "Recording Working Time Directive Data" on page 264.

Deleting a Timesheet

If a timesheet is no longer required, you can delete it.

Note: *Deleting a timesheet deletes timesheet records from the Personnel Director database, but does not delete any associated Absence records.*

1. On the Working Time Directive menu, click the Delete Timesheet icon.
2. Select the timesheet you want to delete and click the Delete button.
3. Confirm that this timesheet is the one to be deleted. Click Yes.

Importing and Exporting Timesheets

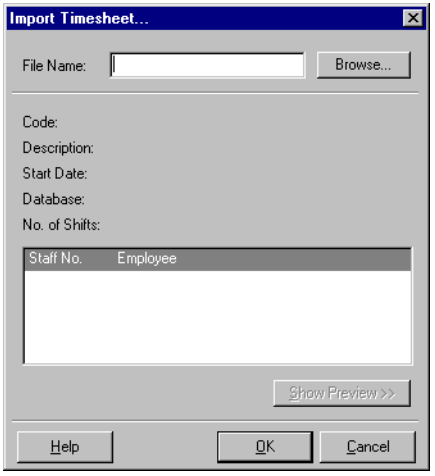
In addition to importing time sheets from (or exporting timesheets to) other applications, you can also exchange Working Time Directive timesheets with other installations of Personnel Director. If, for example, an employee had timesheets that were created in a different installation of Personnel Director and you want to include that timesheet data in your system, simply have the employee export the timesheet and then import it into your system.

Note: If you import a timesheet that has the same name as an existing timesheet, a message warns you that you are about to replace the existing timesheet. At this point, you can cancel the import if you want.

To import a Working Time Directive timesheet:

1. On the Working Time Directive menu, click the Import Timesheet icon.

   The Import Timesheet screen appears.



2. Click the Browse button to locate the file that contains the timesheet you want to import.

   Note: *You can import data stored in any one of the following formats: Formula One or 2.x; Excel 4, 5 or 7; Tabbed Text or Tabbed Text Values Only; or, HTML or HTML Data Only.*

   Information about the timesheet appears for your reference.

3. To preview the timesheet before importing, click the Show Preview button.
4. To import the timesheet, click the OK button.

To export a Working Time Directive timesheet:

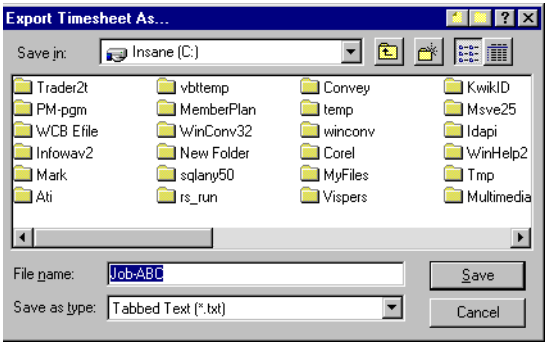
1. Do one of the following:
   - Create the timesheet you want to export.

   -or-

   - Modify the timesheet you want to export.

2. On the Working Time Directive timesheet screen, click the Export button, select Export from the File menu, or press Ctrl+E.

   The Export Timesheet As screen appears.



3. Select the path and type a name for the file that is to contain the timesheet.
4. To convert the data into a different format, select one of the following file types: Formula One or 2.x; Excel 4, 5 or 7; Tabbed Text or Tabbed Text Values Only; or, HTML or HTML Data Only.
5. Then click Save.

Printing Timesheet Reports

You can print an individual timesheet or a number of different timesheet reports.

Printing Timesheets

You can print timesheets as you create or modify them. If desired, you can also change the timesheet layout.

To print a timesheet:

1. Do one of the following:
   - Create the timesheet.

   -or-

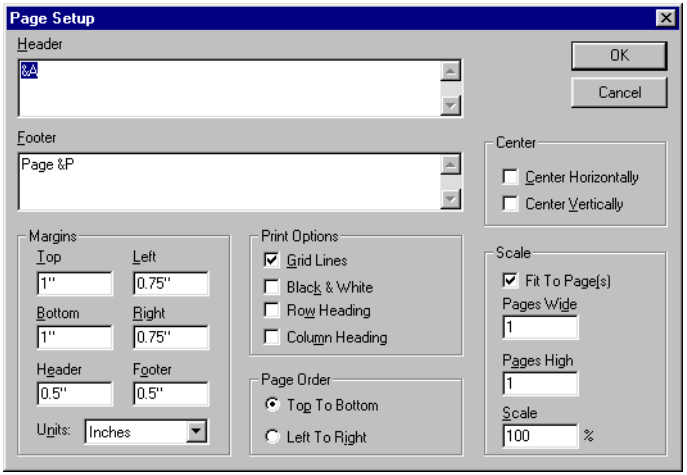
   - Modify the timesheet you want to print.

2. On the Working Time Directive timesheet screen, click the Print button, select Print from the File menu, or press Ctrl+P.

To change the timesheet page layout:

1. Select Page Setup from the File menu.

   The Page Setup screen appears.



Provide the following information where required:

Header. Type the text to appear at the top of each page.

Footer. Type the text to appear at the bottom of each page.

Use the following codes to control the format of the header or footer.

&L	Left-aligns the characters that follow.
&C	Centers the characters that follow.
&R	Right-aligns the characters that follow.
&D	Prints the current date.
&T	Prints the current time.
&F	Prints the workbook name.
&A	Prints the worksheet name.
&P	Prints the page number.
&P+number	Prints the page number plus number.
&P-number	Prints the page number minus number.
&&	Prints an ampersand.
&N	Prints the total number of pages in the document.

The following font codes must appear before other codes and text or they are ignored. The alignment codes (for example, &L, &C, and &R) restart each section; new font codes can be specified after an alignment code.

&B	Use a bold font.
&I	Use an italic font.
&U	Underline the header.
&S	Strikeout the header.
&O	Ignored.
&H	Ignored.
&"fontname"	Use the specified font.
&nn	Use the specified font size - must be a two digit number.

Center. Specify the page centering options.

- Click the Center Horizontally checkbox to center the timesheet between the left and the right edges of the printed page.
- Click the Center Vertically checkbox to center the timesheet between the top and bottom edges of the printed page.

Margins. Type the measurements for the margins, header and footer. Select the measurement units from the Units drop-down list.

Print Options. Click the appropriate checkbox to control the following print options:

- Click the Grid Lines checkbox to print the spreadsheet's grid.
- Click the Black & White checkbox to convert all colours to black and remove patterns when printing.
- Click the Column checkbox to print column headings. Clear the checkbox to remove column headings when printing.
- Click the Row checkbox to print row headings. Clear the checkbox to remove column headings when printing.

Page Order. Indicate how the timesheet is to be printed.

- To print pages in the timesheet workbook from top to bottom before printing left to right, select the Top to Bottom option.
- To print pages in the timesheet from left to right before printing top to bottom, select the Left to Right option.

Scale. Indicate how the timesheet is to be scaled.

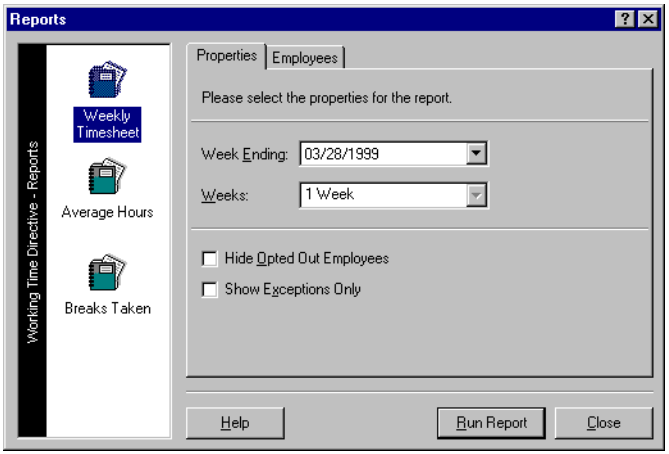
- Click the Fit To Pages checkbox to compress the spreadsheet workbook onto the number of pages that you specify.
- Type the number of pages high and wide you want to be printed.
- Specify the percentage to scale the spreadsheet.

Printing Other Working Time Directive Reports

You can view or print the following reports: Weekly Timesheets, Average Hours or Breaks Taken.

1. On the Working Time Directive menu, click the Timesheet Reports icon.

   The Timesheet Reports screen appears.



2. Select the report you want to view or print and click Run Report.
3. Choose the properties of the report:

   Week Ending. Select or type the date

   Weeks. Type the number of weeks to be included.

   Hide Opted Out Employees. If employees who have opted out of the Working Time Directive are not to be included, click this checkbox.

   Show Exceptions Only.

   - For the Breaks Report, click this checkbox to list only employees who haven't taken breaks.
   - For the Average Hours Report, click this checkbox to list only employees whose average hours exceed 48 hours.

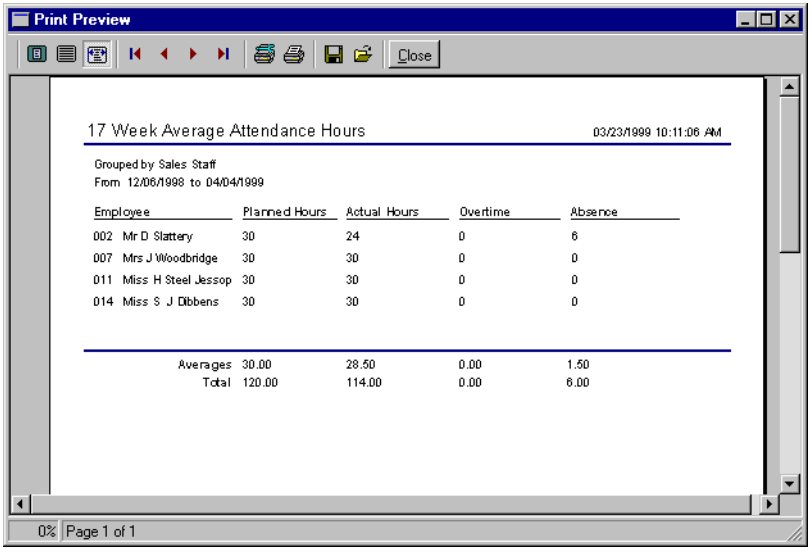
4. Click the Employees tab to choose which employees are to be included in the report:

   - To include all employees, click the All Employees radio button.

- To include only employees belonging to a specific group, click Group. Select the group that you want to use from the drop-down list.
- To include only employees as identified by an Employee Filter, click Filter. Select the filter that you want to use from the drop-down list.
- To include only those employees that match the search criteria you specify, click User Defined Filter. Then select the field to be searched and the value to be used; for example, to only include employees who are 35 years old, select Age and type or select 35.

5. Click the Run Report button.

   The report appears.



6. To save the report for archive purposes, click the Save button. Select the folder, specify the name for the file and click the Save button.

   To view the saved report at a later date, click the Load button. Select the folder and name of the file and click Open.

7. To exit, click the Close button.

11 USING THE DIARY

Overview

To keep track of important events and dates, Personnel Director provides you with a diary or you can use Microsoft Outlook.

Notes:

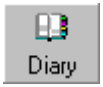
- Be sure to indicate which diary you want to use. For instructions, see "Setting Diary Reminder Preferences" on page 81.
- If you use Microsoft Outlook, you can remove the Diary Monitor from the Startup menu. For instructions, see your Windows documentation. You must, however, run both Personnel Director and Outlook simultaneously to display reminders. For more information about the diary monitor, see "The Personnel Director Diary Monitor" on page 276.

You can insert Diary Reminders yourself, or you can instruct Personnel Director to automatically create diary reminders for you when certain events occur, such as an employee's end of probation date.

Personnel Director checks the diary approximately every one-and-a-half minutes and displays a pop-up reminder window if it finds any pending diary reminders (described in "Using the Diary Reminder Pop-up Window" on page 284).

This chapter describes the basic concepts of the diary. However, comprehensive online help is provided from within the diary program itself. To display this help, start the diary and press the F1 key.

Activating the Diary



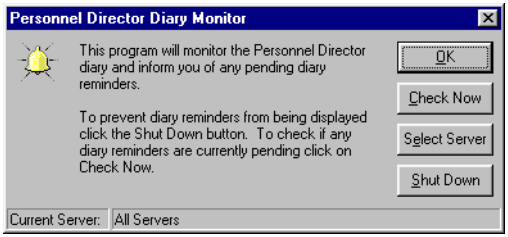
Use one of these methods to display the Personnel Director diary:

- Do one of the following:
  - Click the Diary button on the Personnel Director Tools toobar.
  - Click the Diary button beside the clock in the Startup box at the end of the Task bar.

    If the diary is already running, but minimised, clicking this button reactivates it and displays it full size on your screen.
  - Instruct Personnel Director to automatically start the diary when you start Personnel Director. For further details, see "Setting Diary Reminder Preferences" on page 81.

The Personnel Director Diary Monitor

The Personnel Director Diary Monitor is an independent program that monitors your diary and displays any pending diary reminders. The diary monitor checks the diary every five minutes.


Personnel Director Diary Monitor
This program will monitor the Personnel Director diary and inform you of any pending diary reminders.
To prevent diary reminders from being displayed click the Shut Down button. To check if any diary reminders are currently pending click on Check Now.
OK
Check Now
Select Server
Shut Down
Current Server:
All Servers

When you install Personnel Director, the Diary Monitor is placed in your Windows Start Up program group. This starts the Diary Monitor as soon as you start Windows.

Controlling the Diary Monitor

1. Right-click the Diary button in the Start box at the end of the Task bar.
2. Do one of the following:
   - To open the diary monitor, select Open.

- To check for reminders, select Check Now.
- To turn the monitor off for this session, select Shut Down.
- To turn the monitor off for this session and subsequent sessions, select Disable.
- To turn on a disabled monitor, select Enable.

Diary Reminders

A diary reminder is a Personnel Director entry in the Personnel Director diary or Microsoft Outlook. Diary reminders have a date and message attached to them, for example, 25/5/97 Mrs Jones - End of Probation. Personnel Director checks the diary every one-and-a-half minutes and displays any pending diary reminders.

Diary reminders can be created by either of these methods:

- Automatically created by Personnel Director.
- Manually entered by you.

Setting Up Automatic Reminders

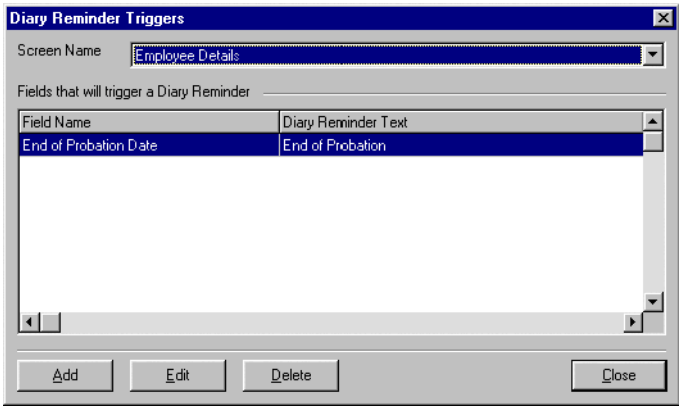
Personnel Director can automatically create diary reminders when information changes in any of the fields on the Employee records screens.

***Note**: You must restart Personnel Director for triggers to come into effect.*

Adding Diary Reminder Triggers

1. Select Diary Reminder Triggers from the Options menu.
2. If the acknowledge message appears, click OK to acknowledge that you have to restart Personnel Director for the triggers to become effective.

The Diary Reminder Triggers screen appears.



3. Select the name of the screen that contains the data from the Screen Name drop-down list.
4. Click the Add button.

   The Add Diary Reminder Trigger screen appears

5. Do the following:

   When The Following Field Changes. Select the name of the field from the drop-down list. When this field changes, it triggers the reminder.

   Description. Type the purpose of the trigger.

   Remind Me. Indicate how long before the event the reminder is to be triggered. Select the duration and period.

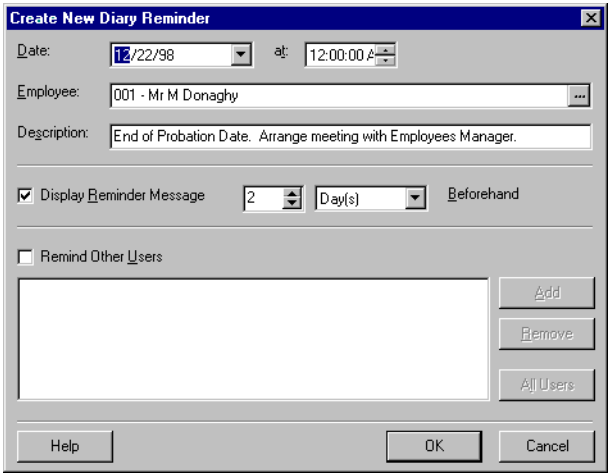
   Inform All Users. Select this checkbox to trigger reminders in the diaries of all other Personnel Director users (if any).

6. Click OK.

The trigger is created.

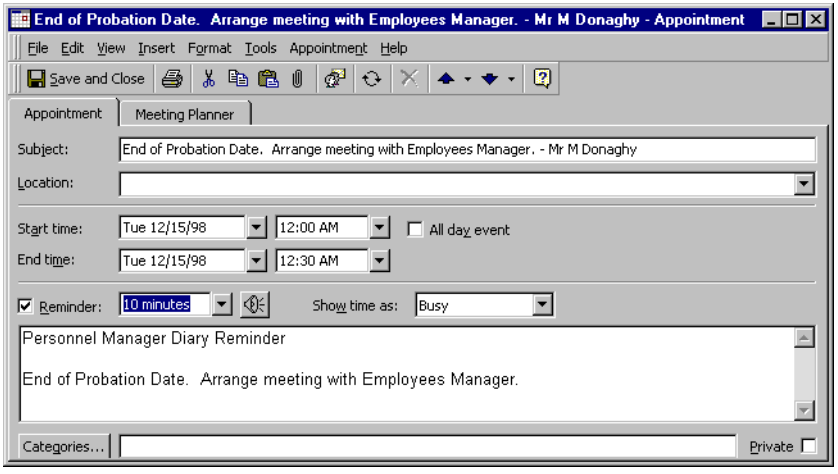
Now when you change the end date for a probation period, this trigger automatically creates a reminder.

- If you are using Personnel Director Diary, the following screen appears.



Click OK to add the reminder.

- If you are using Microsoft Outlook, the following screen appears.



Follow the instructions for adding the reminder as outlined in the Microsoft Outlook documentation.

Editing Diary Reminder Triggers

1. Select Diary Reminder Triggers from the Options menu.
2. If the acknowledge message appears, click OK to acknowledge that you have to restart Personnel Director for the triggers to become effective.

   The Edit Triggers screen appears.
3. Select the name of the screen containing the data that triggers the reminder.
4. Select the name of the trigger.
5. Click the Edit button.

   The Add Diary Reminder Trigger screen appears.
6. Edit the required fields.
7. Click OK.

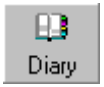
Deleting Diary Reminder Triggers

1. Select Diary Reminder Triggers from the Options menu.

   The Edit Triggers screen appears.
2. Select the name of the screen containing the data that triggers the reminder.
3. Select the name of the trigger.
4. Click the Delete button.
5. Confirm the deletion. Click the Yes button.
6. Click OK.

Creating Diary Reminders Manually

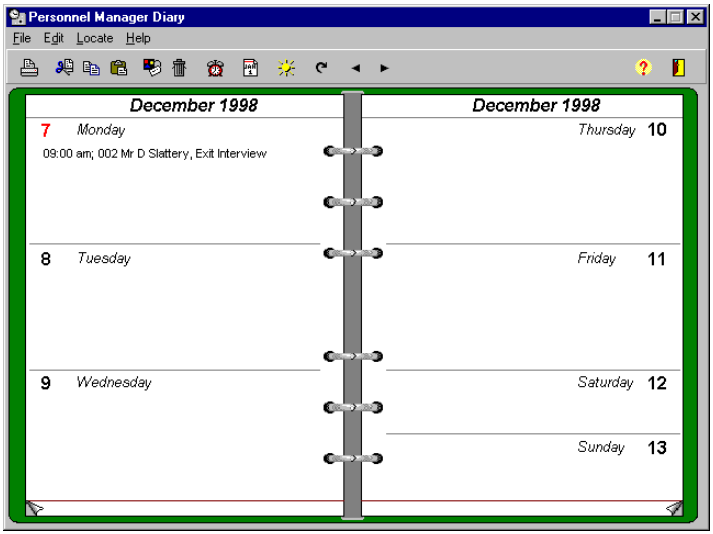
Use this procedure to enter your own reminders into the diary.



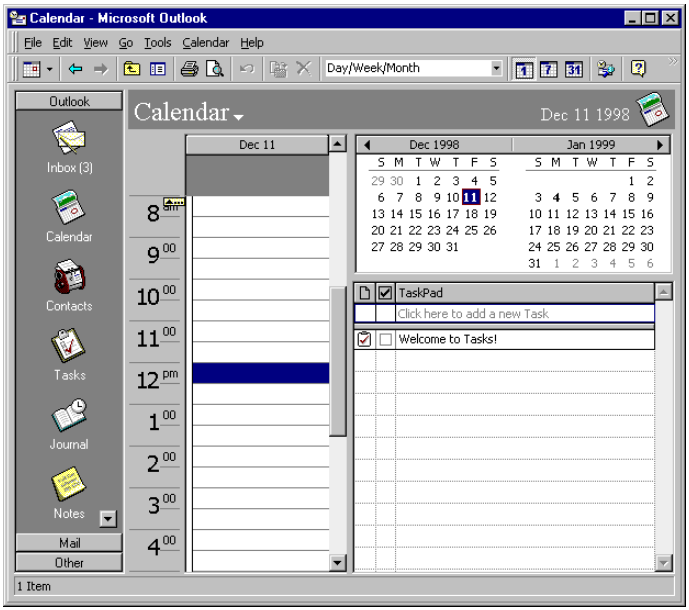
1. To start the diary, click the Diary button on the Tools toolbar.

   The screen that appears depends on whether you are using the Personnel Director Diary or Outlook.

- If you are using Personnel Director Diary, a screen similar to the following is displayed.



- If you are using Outlook, a screen similar to this appears.



Outlook Users Note: *Follow the instructions in your Outlook documentation.*

2. Display the date. If you are using Outlook, follow the instructions in the Outlook documentation. If you are using Personnel Director Diary, take one of the following actions:

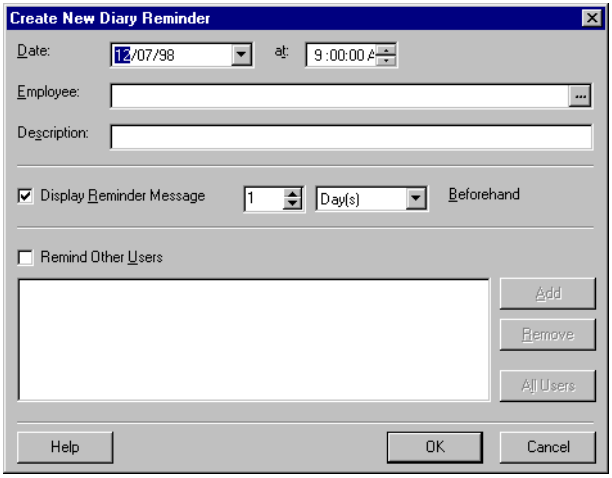
- Click the Go To Date button on the Diary toolbar, select the date and click Go To.
- Click the bottom right or bottom left corner of the diary

- Use the navigation buttons, Previous Week or Next Week on the toolbar until the desired page is displayed.

Note: *You can also set the date when you are entering the reminder.*

3. Click the New Reminder button.

   The New Reminder dialog is displayed.



Note: *If there is more than one user sharing Personnel Director on a workstation or on the network, a Remind Other Users prompt is also shown at the bottom of the screen.*

4. Enter the details of the reminder.

   Date. If the date is different than the one displayed, select the date.

   Time. If the time is different than the one displayed, select the time.

   Employee. Select the name of the employee from the Pick List.

Description. Type the purpose of the event or meeting.

Display Reminder Message. Click this checkbox if you want a reminder to appear in your diary. Then indicate how long before the event the reminder is to be triggered. Select the duration and period.

Remind Other Users. Select this checkbox to trigger reminders in the diaries of all other Personnel Director users' (if any).

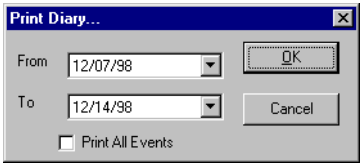
- To add a user to the list, click the Add button, select the user's name and click Add.
- To add all users, click the All Users button.
- To remove a user from the list, select the user's name in the list and click Remove.

5. Click OK.

Printing Your Diary

1. Click the Print button on the Diary toolbar.

   The Print Diary screen appears.

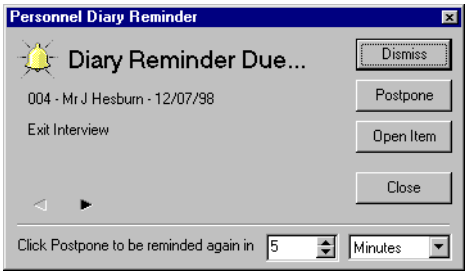


2. Do one of the following:
   - To indicate a date range, select or type the start date in 'From', then select or type the end date in 'To'.
   - To print all events, click the Print All Events checkbox.
3. Click OK.

   The Print Preview screen appears displaying a printed version of the diary.
4. To print the diary, click the Print button; to return to the diary, click the Close button.

Using the Diary Reminder Pop-up Window

The Personnel Director Diary Monitor displays pending diary reminders in a pop-up window.



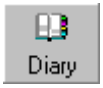
The Diary Reminder screen displays the date of the reminder, the employee who the reminder is about (including employee number), and the diary reminder text.

1. Do any of the following when the diary reminder pop-up is displayed:
   - To display the next and previous pending diary reminders, use the navigation buttons.
   - To postpone a diary reminder, if necessary change the time and duration in Click Postpone To Be Reminded In, then click the Postpone button.
   - To prevent a reminder from being displayed, but retain it in the diary, click the Dismiss button.
2. When you finish viewing the diary reminders, click the Close button.

Exporting Personnel Director Diary Items to Outlook

If necessary, you can export Personnel Director diary items to Microsoft Outlook.

***Note**: If you are changing the diary function to use Microsoft Outlook, follow the instructions regarding Microsoft Outlook in the "Overview" on page 275.*



1. To start the diary, click the Diary button on the Tools toolbar.
2. From the File menu, select Export to MS Outlook.

12 WORKING WITH GROUPS AND FILTERS

Read this chapter to find out how to create and use employee groups and filters. Both can reduce the amount of time required to locate records when updating employee records as well as when generating letters, charts, and reports.

Working with Groups

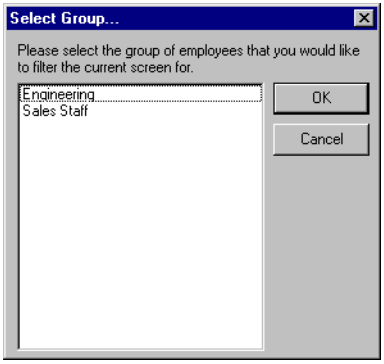
You can organise employee records into distinct groups within a database. For example, perhaps you have 300 records on your database but you only need to work on 10 of these records. By creating a group for these employees, you exclude the extra 290 records, making it easier to navigate between relevant employee records on the main screen.

Groups are also extremely useful when creating letters, charts, and reports. You can use the word processor to create mail merge letters for all the employees in a particular group. Reports and charts can be filtered to include only data from employees in a particular group.

Employees can be members of more than one group - for example one employee could be a member of two groups such as New Starts and Engineers. Assigning an employee to a particular group does not affect the data contained in each record, and groups can be removed easily from the database.

Selecting a Group

1. On the Employee Navigator, click the Group button.



2. Highlight the group that you would like to work with and click the OK button.

   The status bar at the bottom of the Employee Navigator displays the name of the current group.

***Note**: To remove grouping from the Employee Navigator, click the Remove Group/Filter button.*

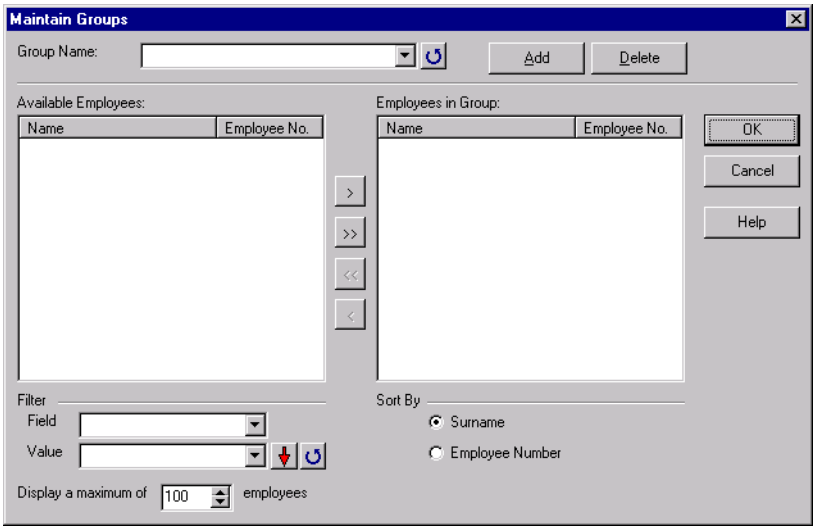
Creating and Maintaining Groups

Use the Maintain Groups dialog to create or delete groups, add employees to a group, or remove employees from a group.

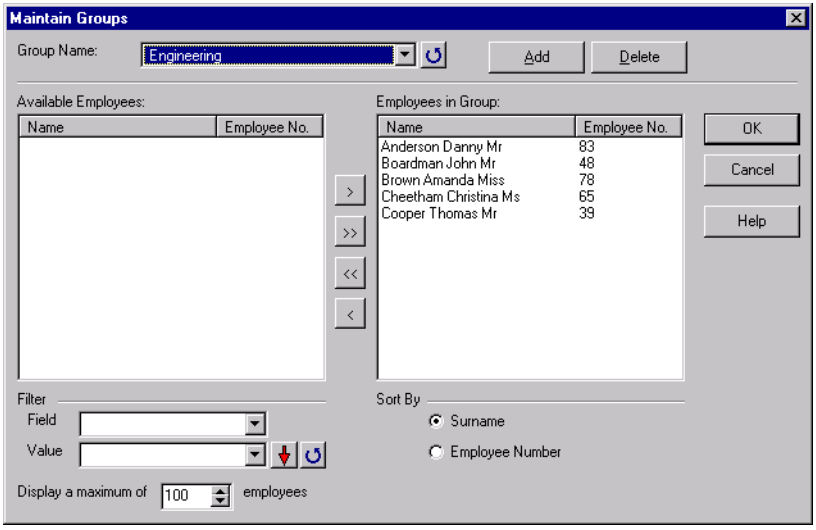
Displaying Employees in Groups

1. Select Maintain Groups from the Employees menu.

The Maintain Groups dialog is displayed.



2. To view the employees in a particular group, select that group using the Group Name drop-down list at the top of the screen.



The screen has two lists. The list on the left, labelled Available Employees, will list all employees who are not in the selected group and can be added to the group. The list on the right, labelled Employees In Group, lists all the employees in the selected group. You can sort

Employees In Group by surname or by employee number; just select the desired option under Sort By.

Adding Employees to a Group

1. On the Maintain Groups dialog, use the Group Name drop-down list to select the group that you want to add the employee(s) to.
2. To display a list of likely candidates, filter the employee records.
   - Provide the following information:

     Field. Select the field to search on from the drop-down list.

     Value. Either type a value or click the button and select a value from the drop down list.
   - Click the Show Employees button.

   A list of employees appears in the Available Employees list.

   Tip: *To add several employees, use Ctrl+click and Shift+click.*

3. To add the selected employees to the group, click the Add button.

   The selected employees are moved into the list on the right.
   - To add all the employees to the group, click the Add All button.

4. Repeat steps 2 and 3 until you have added all the employees you want in the group.

Removing Employees from a Group

1. On the Maintain Groups dialog, use the Group Name drop-down list to select the group that you want to remove the employee(s) from.
2. To select the employees to be removed the group, use the mouse to click their names in the Employees in Group list.

   Tip: *To remove several employees, use Ctrl+click and Shift+click.*

3. To remove the selected employees from the group, click the Remove button.

   The selected employees are moved into the list on the left.

- To remove all the employees from the group, click the Remove All button.

Creating New Groups

1. To create a new group, click the Add button.
2. Enter a name for the group. This name cannot already exist and can be no longer than 20 letters or numbers.

3. Click the OK button to create the group.

   To add employees to the new group, select them from the list and refer to "Adding Employees to a Group" above.

Deleting Groups

- Select the group to be deleted from the Group Name drop-down list, and click the Delete button.

  Note: *This deletes the group and not the employee records.*

Displaying an Employee's Group Membership

Use this procedure to display a list of groups that the current employee is a member of.

1. Click the Employee Details screen of the employee whose membership you wish to see.
2. Select Group Membership from the Employees menu.

   The following screen is displayed, listing all the groups that the current employee is a member of.

Working with Filters

There may be times when you want to view or update information from Personnel Director that cannot be accessed by groups. You can create filters to select specific employee records when updating records manually, when using batch input, or global update. You can use employee filters to select the employees who are to appear on the holiday and absence schedule. Employee filter queries can be as complex as you require.

Creating an Employee Filter

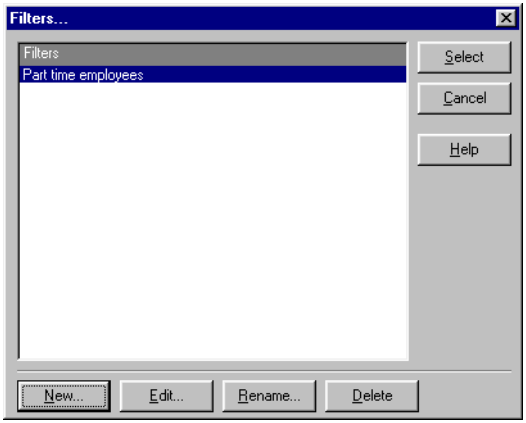
This section illustrates a number of examples showing how to create employee filters.

Example 1 - Creating a Filter to Access Records of Employees with a Specific Benefit

You have to renew employee travel cards. You decide to create an employee filter so that you can quickly access Benefit records of those employees who have a travel card.

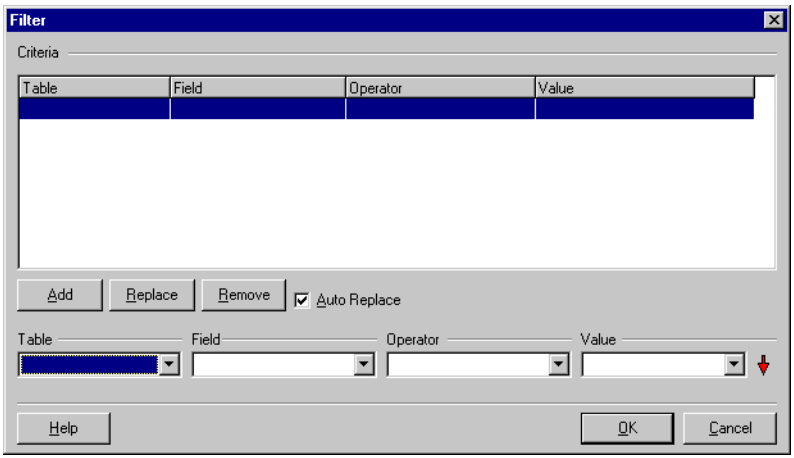
1. On the Employee Navigator toolbar, click the Filter button.

   The Filter screen appears.



2. Click the New button.

   The Filter screen appears.



3. Use this screen to set the criteria for selecting travel card benefit records. To do this, you create a selection statement by filling in the Table, Field, Operator and Value Fields.

   Table: A benefit is maintained in the Benefit record, so you need to access the benefit information stored in the Benefits table. To do this, select **Benefits** from the Table drop-down list.

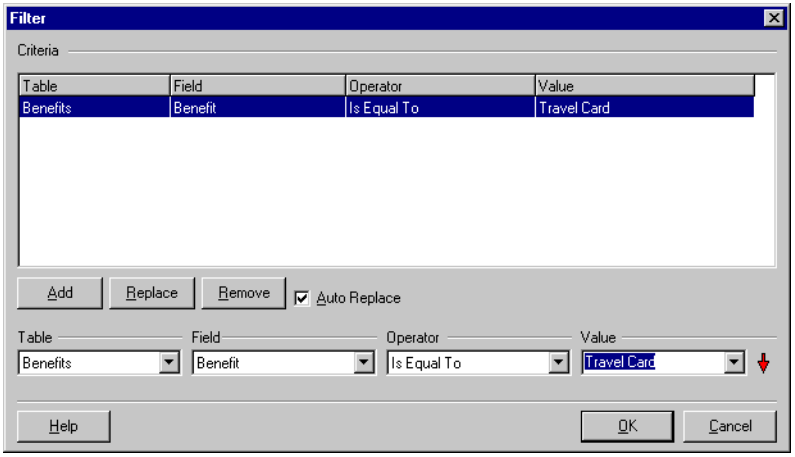
Field: In this example, the benefit type is maintained in the Benefit field. Select **Benefit** from the Field drop-down list.

Operator: You want to display records that are an exact match. From the Operator drop-down list, select **Is Equal To**.

Value: You want to display records that match the benefit of Travel Card. Click ; this lists possible values in the drop-down list. Either select **Travel Card** from the drop-down list or type **Travel Card**.

4. Now that you have completed the statement, click the Add button.

   The statement now appears in the Criteria list.



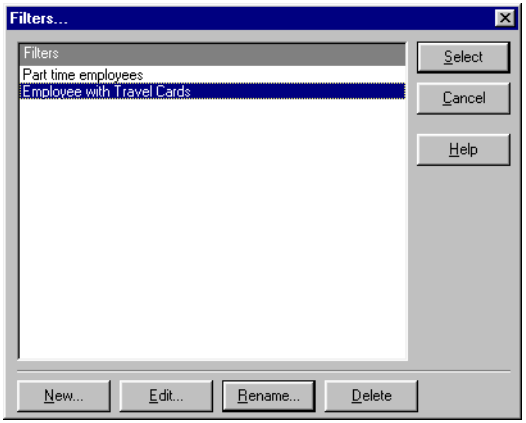
   Notice that, if required, you can replace or remove an existing statement.

5. Click the OK button.

   The Personnel Director screen is displayed.

6. Type a name for the filter; for example, **Employees with Travel Cards** and click OK.

The filter you just created appears in the Filters screen.



7. To filter the benefit records so that only those records for travel card benefits, simply select the name of the filter and click the Select button.

   The Benefits screen for the first travel card appears. To view the remaining records for travel card benefits, click the employee in the Employee Navigator.

***Note**: To remove a filter from the Employee Navigator, click the Remove Group/Filter button.*

You now have a travel card filter which will pull the benefit records of employees with travel cards. Try running it to see if it works.

Example 2 - Creating a Filter to Access Records of Employees In a Specific Project

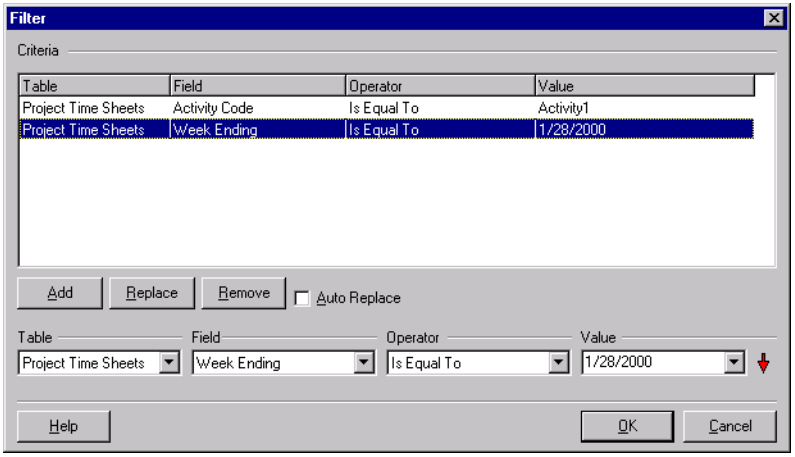
The hours for Project A Time Sheets last week were recorded incorrectly and must be updated. You want to update these Time Sheets for the week ending January 28, 2000. To make updating easier, you decide to create an employee filter.

1. On the Employee Navigator toolbar, click the Filter button.
2. Click the New button. The Filter screen appears.
3. Set the criteria for selecting Project 1 time records for the week ending January 28, 2000. To do this, you create a selection statement to select all Project Time Sheets with a Project code of Project 1, then create another

statement to select only those with the week ending January 28, 2000. Remember to click the Add button after creating each statement.

Table	Field	Operator	Value
Project Time Sheets	Project Code	Is Equal To	Project1
Project Time Sheets	Week Ending	Is Equal To	1/28/2000

The Filter screen looks similar to this.)



4. To save the criteria you just specified, click OK.
5. Type a name for the filter; for example, **Project 1 Time Sheets - 1/28** and click OK.

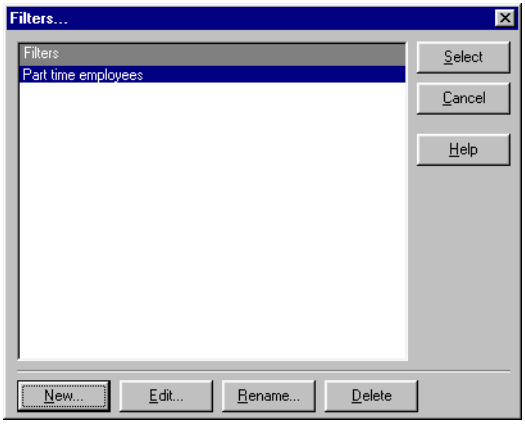
You now have a filter which will pull the Project 1 Project Time Sheet records for the week ending January 28, 2000. Try running it to see if it works.

Applying an Employee Filter

To apply an employee filter from the list of employee filters:

1. Click the Filter button on the Employee Navigator.

   The Filters screen is displayed.



2. Select the filter you want to run and click the Select button.

   The status bar at the bottom of the Employee Navigator displays the name of the current filter.

3. Double-click the name of the employee you want to work with. The Employee Details screen appears for that employee.

4. When you are finished with the employee's record, return to the Employee Navigator to select the next employee.

***Note**: To remove a filter from the Employee Navigator, click the Remove Group/Filter button.*

Editing an Existing Employee Filter

To open an existing employee filter:

1. Click the Filter button on the Employee Navigator.
2. Select the filter you want to open and click the Edit button.
3. Add, change or remove the filter statements and click OK.

Deleting an Employee Filter

To delete a filter from the list of employee filters:

1. Click the Filter button on the Employee Navigator.
2. Select the filter you want to delete and click the Delete button.

13 Working with Personnel Director Report List

Overview

Similar to using Windows Explorer to manage your computer files, you use Personnel Director's Report List to manage Personnel Director report, letter, and graph files.

With the Report List, you can:

- Create, update, rename, preview or delete reports, letters or graphs and refresh the Report List contents.
- Create, rename, or delete folders to hold your reports, letters and graphs.
- Import and export reports, letters and graphs.

Starting and Exiting Personnel Director Report List

To start Personnel Director Report List:

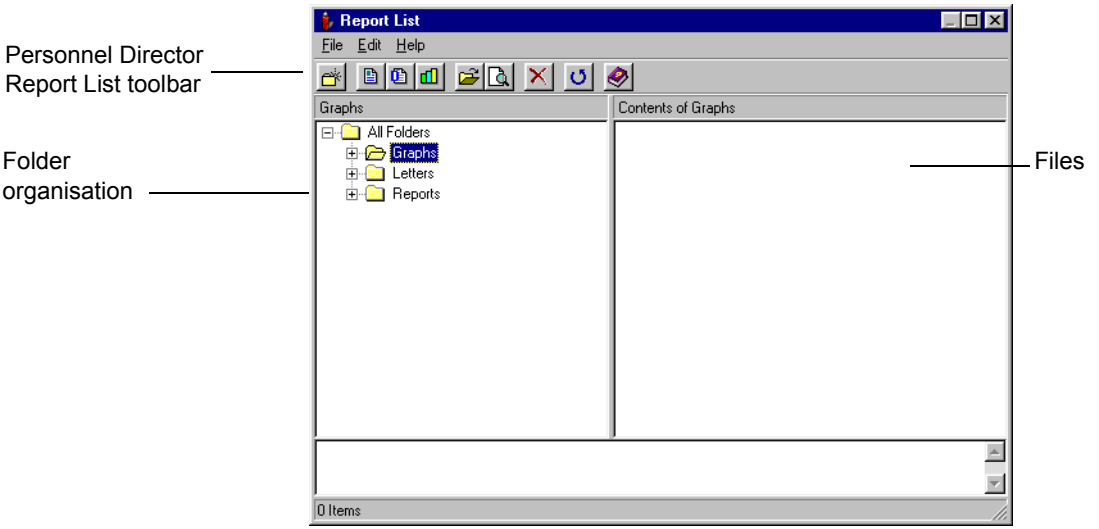
- Click the Reports button on the Tools toolbar or select Reports from the Tools menu.

To close the Report List:

- From the Report List File menu, select Close.

About the Personnel Director Report List Window

Personnel Director comes with numerous pre-defined reports, letters and graphs which you can use or customise. You can also create your own.



Like Windows Explorer, the Report List can organise your files in folders and subfolders. Double-clicking a folder or subfolder in the left pane displays any of its associated subfolders or files in the right pane. For example, double-clicking the All Folders folder displays the Graphs, Letters, and Reports subfolders.

The Personnel Director Report List Toolbar

Use the buttons on the Report List toolbar to manage your Personnel Director report, letter, and graph folders and files.

	Create a new folder.
	Create a new report.
	Create a new letter.
	Create a new graph.
	Open the selected file.
	Delete the selected folder or file.
	Preview the selected report or graph file. For a letter, launch the Mail Merge Wizard.
	Refresh the display to see the latest file and folder contents.

Managing Folders

You can create or rename folders and subfolders for your Personnel Director reports, letters, and graphs. If you no longer require a folder, you can delete it.

Creating a Folder

1. Click the name of the folder which is to contain the new folder.

2. Click the New Folder button on the Report List toolbar.

   -or-

   Select New>Folder from the Report List File menu.

Renaming a Folder

1. Click the name of the folder to be renamed.
2. Select Rename from the Report List Edit menu or press F4.
3. Type the new name and press Enter.

Deleting a Folder

1. Click the name of the folder to be deleted.

2. Click the Delete button on the Report List toolbar or press Del.

   -or-

   Select Delete from the Report List Edit menu.

Managing Report, Letter and Graph Files

You can create, edit, preview, or rename your Personnel Director report, letter and graph files. If you no longer require a file, you can delete it. You can also sort the display of files by name, file type, owner and date.

Creating a Report, Letter or Graph File

1. Click the name of the folder which is to contain the new file.
2. Click the New button for the type of file (Report, Letter or Graph) on the toolbar.

   -or-

   Select New from the Report List File menu and select Report, Letter, or Graph.

   - If you are creating a graph, Personnel Director Graph Wizard appears. For instructions on how to create a graph, see chapter 15 "Working With Graphs" on page 333.
   - If you are creating a letter, Personnel Director Word Processor appears. For instructions on how to create a letter, see chapter 14 "Word Processing and Mail Merging" on page 305.

- If you are creating a report, the Report Builder's Query Wizard and Query Designer appears. For instructions on how to create a report, see chapter 17 "Working With Reports" on page 387.

3. To return to the Personnel Director Report List, select Exit from the File menu on the word processing or charting screen, or select Cancel and close the Report Builder window.

Moving Files to Other Folders

To move a file to another folder:

- Select the file then drag it to a different folder.

Previewing a File

1. Click the name of the file to be viewed.

2. Click the Preview button on the Report List toolbar.

   -or-

   Select Preview from the Report List File menu.

3. To return to the Report List, select Exit from the File menu on the word processing, or charting screen or select Cancel and close the Report Builder window.

Editing a File

1. Click the name of the file to be updated.

2. Click the Open button on the Report List toolbar.

   -or-

   Select Open from the Report List File menu or shortcut menu.

3. To return to the Report List, select Exit from the File menu on the word processing, or charting screen or select Cancel and close the Report Builder window.

Renaming a File

1. Click the name of the file to be renamed.
2. Select Rename from the Report List Edit menu or shortcut menu, or press F4.
3. Type the new name and press Enter.

Deleting a File

1. Click the name of the file to be deleted.

2. Click the Delete button on the Report List toolbar.

   -or-

   Select Delete from the Report List Edit menu or press Del.

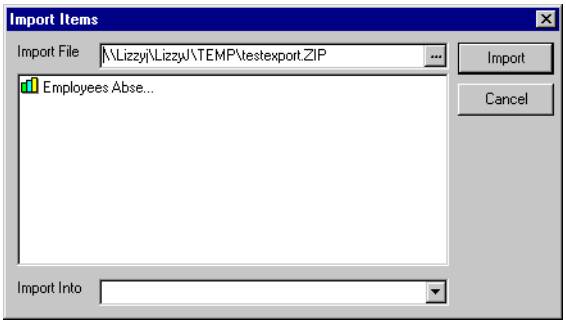
Refreshing the Files and Folders List

- Click the Refresh button on the Report List toolbar, or press F5.

Importing a File

You can import a letter, report, or graph which was previously exported. For example, you might want to import a letter template created by another user.

1. From the File menu, select Import Items.
2. Click the Import File Browse button to locate the file you want to import. Select the file and click the Open button.



3. From the Import Into drop-down list, select the Personnel Director Folder you want to store the file in.
4. Click the Import button.

Exporting a Letter, Report, or Graph File

You can export letters, reports, or graphs for use in a different installation of Personnel Director. For example, you could export a graph you customised so it could be used by another Personnel Director installation.

1. Select the file or files you want to export in the Report List.
2. From the File menu, select Export Items.
3. Provide the following information:
   - Navigate to the drive and directory where you want to create the exported file.
   - **File Name:** Type a name for the file.
   - **Save As Type:** The file type must be Export File.
4. Click the Save button, then click OK at the successful export message.

14 WORD PROCESSING AND MAIL MERGING

Overview

You can use Personnel Director's own integrated word processor or Microsoft Word for Windows for your word processing needs. Use either of these word processors to create letters, memos, fax covers, and correspondence from within the system, without the need to transfer data to another application.

Personnel Director comes with a selection of standard employment letter templates, including contract letters, warning letters, and recruitment letters. These pre-defined letter templates are ready for you to use or to modify to meet your specific requirements. Any letter or document you generate within the system can be sent to individual employees, groups of employees, or to everybody who has a record in the database.

The integrated Personnel Director word processor is easy to use and functions in the same way as most Windows-based word processors. Documents, once created, can be saved and retrieved at any point.

Optionally you can use Microsoft Word for Windows with Personnel Director. Microsoft Word introduces a host of features including the ability to create mailing labels and envelopes, both of which are exploited by Personnel Director. Although Personnel Director makes the task of creating Microsoft Word mail merge documents and templates very easy, you are advised to become familiar with the word processing and mail merge features available within Microsoft Word. Note that Vizual Business Tools cannot offer technical or customer support concerning general use of Microsoft Word.

Notes:

- *Be sure to indicate which word processor you want to use. For instructions, see "Setting Your Add-On Preferences" on page 84. Personnel Director will store your mail merge letter files in .DOC format if you select Microsoft Word, and .RTF format if you are using the built-in word processor.*

- *Company details used in a mail merge are those set for the office you select using Set My Office from the View menu. For instructions, see "Setting the Office" on page 62.*

About Pre-Defined Letter Templates

The Letters folder in the Personnel Director Report List contains the following options for writing letters to one or more employees. Each template is initially in .RTF format for use with the Personnel Director word processor. If you set your preferred word processor to Microsoft Word, the templates are converted to .DOC format the first time you do a mail merge.

- **Letter:** Write a standard letter that has the name and address of the employee and company filled in, but no content. You write the body of the letter using the word processor. This document is based on the standard letter template called Letter (letter.rtf or letter.doc) in the root Letter folder.
- **Memo:** Write a memo that has the date and employee name filled in. You fill in other headings using the word processor. This memo is based on the memorandum letter template called Memo (memo.rtf or memo.doc) in the root Letter folder.
- **Fax:** Write a fax cover sheet; headings you fill in using the word processor. This document is based on the fax cover letter template (faxcover.rtf or faxcover.doc) in the root Letter folder.
- **Letter Folder List:** Write different types of letters organised by category. Click a folder to see the letters, such as recruitment, employment, or contract letters, it contains. Use the folder list to create and store letters based on the templates that come with Personnel Director, as well as letter templates that you create or modify yourself. These documents are grouped by subfolder within the Letters folder.

Writing Standard Documents

You can quickly write a standard letter, memo, or fax to one or more employees.

1. Do one of the following:
   - To write a letter, click the down arrow to the right of the Letters button and select Write Letter.

     -or-

     Select Write Letter from the Tools menu.
   - To write a memo, click the down arrow to the right of the Letters button and select Write Memo

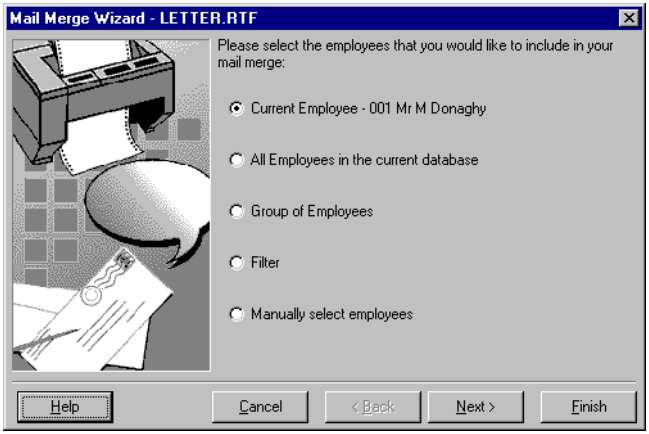
     -or-

     Select Write Memo from the Tools menu.
   - To write a fax, click the down arrow to the right of the Letters button and select Write Fax

     -or-

     Select Write Fax from the Tools menu.

   The Mail Merge Wizard appears.

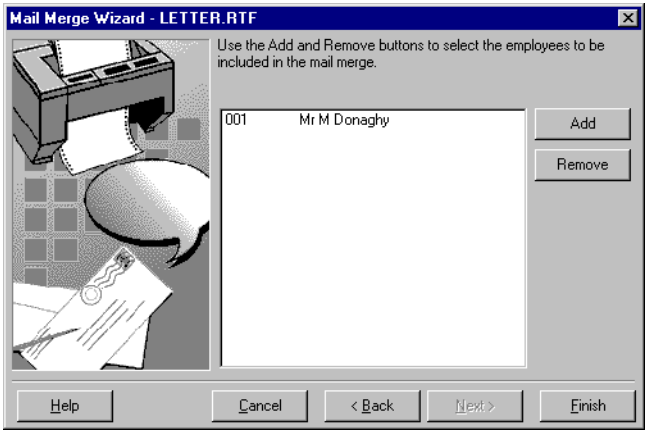

Mail Merge Wizard - LETTER.RTF
Please select the employees that you would like to include in your mail merge:
Current Employee - 001 Mr M Donaghy
All Employees in the current database
Group of Employees
Filter
Manually select employees
Help
Cancel
< Back
Next >
Finish

2. Select the individuals who are to receive the document.
   - To select the current employee, click the Current Employee option.

- To select all employees, click the All Employees In The Database option.
- To select a group of employees, click the Group Of Employees option, then select the Group from the drop-down list.
- To select a filter, click the Filter option and select the name of the filter from the drop-down list.
- To select employees individually, click the Manually Select Employees option.

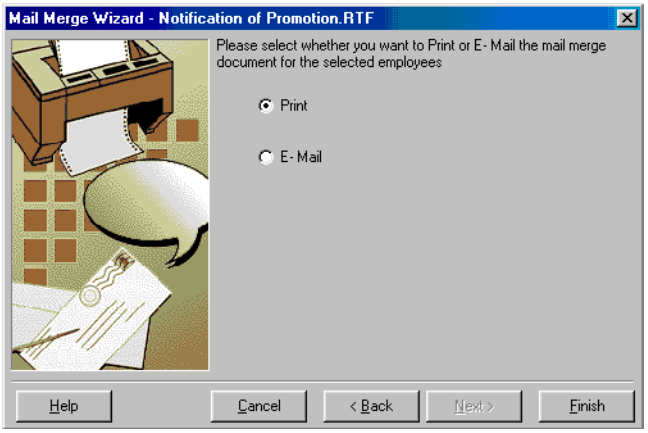
3. Click the Next button.

   The second screen of the Wizard appears.



4. If required, add or remove employees from the list:
   - To add one or more recipients to the list, click the Add button. Select the additional employees and click the OK button.
   - To remove an employee from the list, select the name and click the Remove button.

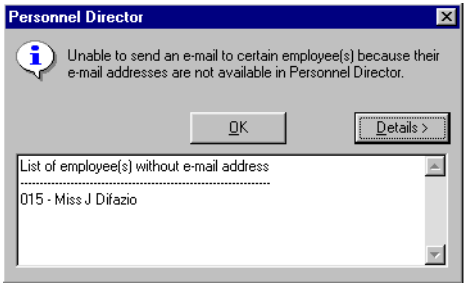
5. Click Next.


Mail Merge Wizard - Notification of Promotion.RTF
Please select whether you want to Print or E- Mail the mail merge document for the selected employees
Print
E- Mail
Help
Cancel
< Back
Next >
Finish

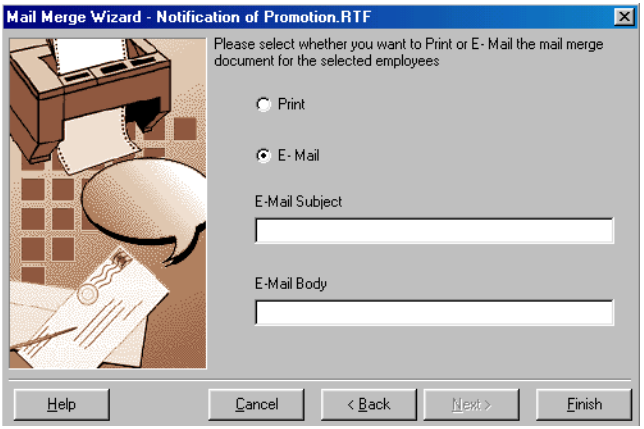
Do one of the following:

- To print the mail-merge document, select the Print option. Continue with step 7.
- To email the mail-merge document, select the E-Mail option and click Next.

  Note: *If you are emailing the document and one or more of employee you selected do not have email addresses, Personnel Director displays a warning. Click the Details button to see the list of employees.*


Personnel Director
Unable to send an e-mail to certain employee(s) because their e-mail addresses are not available in Personnel Director.
OK
Details >
List of employee(s) without e-mail address
015 - Miss J Difazio

6. If you are emailing the document, provide the following information:

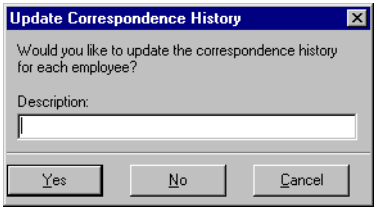


E-Mail Subject. Type the topic of the email that will appear as the Subject line in the email.

E-Mail Body. Type an explanation, if required. This will appear as the body in the email.

7. Click Finish.

   The Update Correspondence History screen appears.



8. Do one of the following:

   - To record this document in Correspondence History, type a description and click the Yes button.
   - To prevent this document being recorded in Correspondence History, click the No button.

   The Personnel Director word processor or Microsoft Word appears displaying the document.

9. Customise the document.

   Add or change the information in the document.

   For more information on using the Personnel Director word processor, see "Using the Personnel Director Integrated Word Processor" on page 322. For more information about using Microsoft Word, see the Microsoft Word documentation.

Writing Other Documents

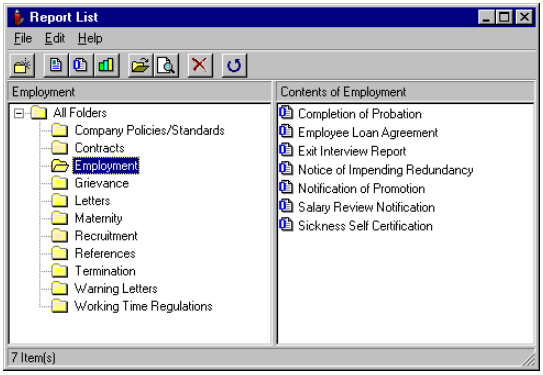
You can create a letter from a letter template you created previously or from a template that comes with Personnel Director and either print it or email it to one or more employees.

***Note 1**: Prior to sending a message, your email address must be entered in your Employee Details record in Personnel Director (see ("Personal Tab" on page 159) or in User Account Details in the Security Module (see "Editing User Accounts or Templates" on page 39).*

***Note 2:** You need use the Set My Record command on the View menu to identify yourself as the sender of the email before you can email mail merge documents. See "Setting Your User Record" on page 314.*

1. Click the Letters button on the toolbar:

   The Personnel Director Report List appears.



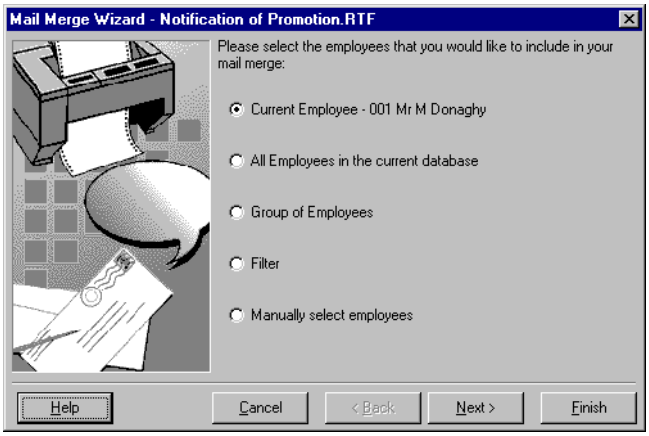
   In the Personnel Director Report List, all letters, faxes, and memos are stored in the Letters folder in subfolders according to their subject matter.

For additional details on how to use the Report List, see chapter 13 "Working with Personnel Director Report List" on page 297.

2. Select the folder that contains the document for which you want to perform a mail merge.
3. Double-click the document, or select it, then click the Preview button on the Toolbar.

   For example, you might want to create a letter to officially notify an employee of their promotion. To select the Notification of Promotion Letter, double-click the Letters folder, then the Employment subfolder. Then double-click the Notification of Promotion letter.

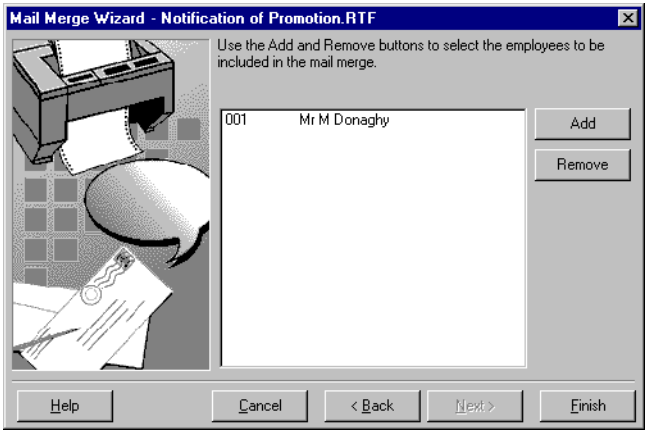
   The Mail Merge Wizard appears.


Mail Merge Wizard - Notification of Promotion.RTF
Please select the employees that you would like to include in your mail merge:
Current Employee - 001 Mr M Donaghy
All Employees in the current database
Group of Employees
Filter
Manually select employees
Help
Cancel
< Back
Next >
Finish

4. Select the individuals who are to receive the document.
   - To select the current employee, click the Current Employee option.
   - To select all employees, click the All Employees In The Database option.
   - To select a group of employees, click the Group Of Employees option, then select the Group from the drop-down list.
   - To select a filter, click the Filter option and select the name of the filter from the drop-down list.
   - To select employees individually, click the Manually Select Employees option.

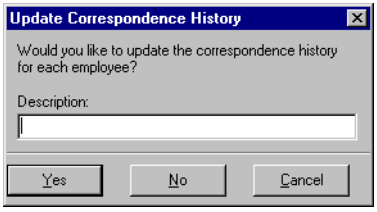
5. Click the Next button.

   The second screen of the Wizard appears.


Mail Merge Wizard - Notification of Promotion.RTF
Use the Add and Remove buttons to select the employees to be included in the mail merge.
001 Mr M Donaghy
Add
Remove
Help
Cancel
< Back
Next >
Finish

6. If required, add or remove employees from the list:
   - To add one or more recipients to the list, click the Add button. Select the additional employees and click the OK button.
   - To remove an employee from the list, select the name and click the Remove button.
7. Click the Finish button.

   The Update Correspondence History screen appears.



8. Do one of the following:
   - To record this document in Correspondence History, type a description and click the Yes button.
   - To prevent this document being recorded in Correspondence History, click the No button.

   The Personnel Director word processor or Microsoft Word displays the document.
9. Customise the document.

   Add or change the information in the document.

   For more information on using the Personnel Director word processor, see "Using the Personnel Director Integrated Word Processor" on page 322. For more information about using Microsoft Word, see the Microsoft Word documentation.

   Note: *You can modify any of the letter templates to meet your specific requirements. See "Modifying Letter Templates" on page 315.*

Setting Your User Record

You can use Set My Record to personalise letters that you create as mail merge documents. Details from your own personnel record can be added to your correspondence, such as printing your name and job title on letters that you are sending to other employees.

1. Locate your own personnel record using the Navigation or Q Find buttons, or enter your own record into the system (see "Creating New Employee Records" on page 149 for further details).
2. Select Set My Record from the View menu. Click Yes to confirm that you want to mark the current record as being your own personnel record.
3. To check which record you have marked as your own, select Goto My Record from the View menu.

   The marked record will be displayed in the main window.

Working with Letter Templates

You can modify the templates delivered with Personnel Director or you can create your own.

Modifying Letter Templates

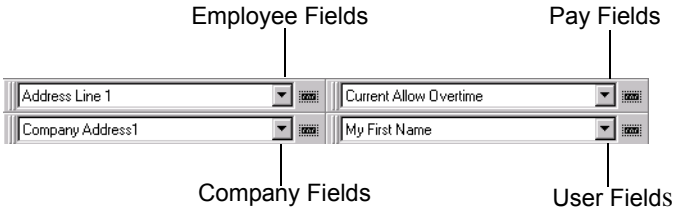
Modify any of the Personnel Director letter templates to suit your requirements. For example, you may want to add clauses to a contract of employment that are not included in the standard versions available in Personnel Director.

1. Follow these steps to select a template to modify:
   - In the Personnel Director Report List, click the Letters folder. A list of subfolders shows the subjects into which the letter templates are grouped (as shown in “Writing Other Documents” on page 311).
   - Click the subfolder containing the template you want to select.
   - Click the template you want to edit, then click the Edit button or select Edit object from the Edit menu.

   The word processor starts and the template opens. In the Personnel Director integrated word processor, all merge fields are preceded by a percent sign % and displayed inside square brackets (%[and]); for example, %[Surname]. In Microsoft Word, merge fields are displayed inside chevrons (« and »); for example, «Surname».

To insert a new merge field using the built-in word processor:

- Select a field from one of the four drop-down lists just above the ruler on the left side of the Document screen. You can insert any available employee, company, pay or user field.



- Click in the document where you want to place the merge field.
- Click the Insert Field button to the right of the drop-down list.

For example, to select the employee's name, select Post Name from the Employee drop-down list, then click the Insert button.

To delete a merge field using the built-in word processor:

- Click at the end of the merge field (the right side), then press Shift and the Left Arrow key to highlight the entire merge field.
- Press the Del key.

To insert a new merge field using Microsoft Word:

- Click the Insert Merge Field button on the toolbar and select the field to insert from the list. If this button is not displayed, see the Word online help.

To delete a merge field using Microsoft Word:

- Highlight the merge field and press the Del key.

Creating Templates with the Personnel Director Word Processor

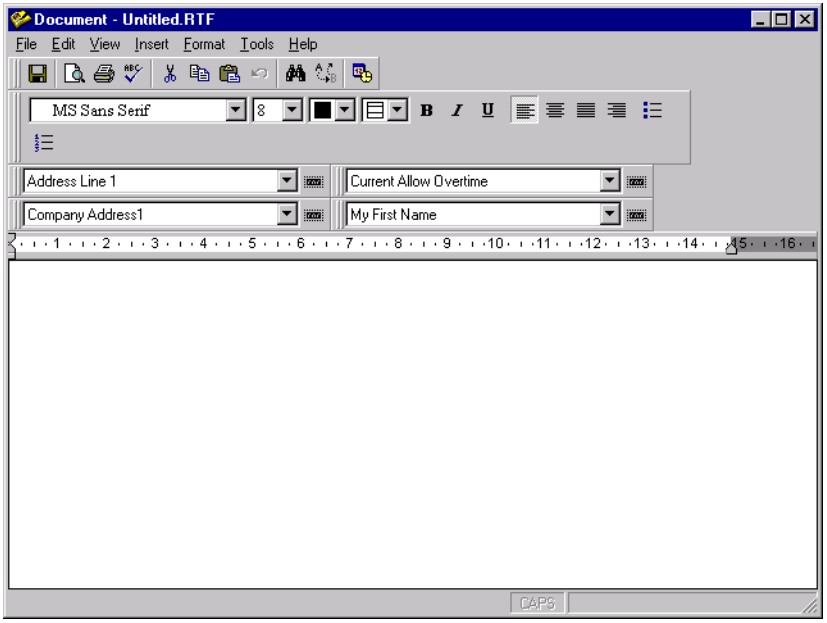
Create new templates whenever they are required. Follow the procedures in this section for the word processor you are using. If you are using Microsoft Word, see “Using Microsoft Word To Create Templates” on page 318.

Note: *Only information (fields) from Employee Details and Current Pay is available for merging.*

To create a new template using the integrated word processor:

1. Make sure that the built in word processor is selected in Options>Preferences>Add Ons.
2. In the Letters folder in the Personnel Director Report List, navigate to the folder in which you want to create the new letter template.
3. Click the New button, or select New>Letter from the File menu.

   The word processor is started and a new blank document with the name you entered is created.



4. Type the text and any mail merge fields that you want in your template.

   For help using the various options in the word processor, select Help Topics from the Help menu or see "Using the Personnel Director Integrated Word Processor" on page 322.

5. Save the document when you have finished. If you save the document earlier, you will not be able to use the mail merge feature unless you save the document under a different name.

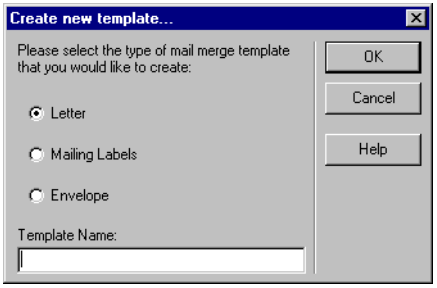
Using Microsoft Word To Create Templates

You can create letter, mailing label, and envelope templates using Microsoft Word.

To create a letter template

To create a letter template using Microsoft Word:

1. Make sure that Microsoft Word is selected in Options>Preferences>Add Ons.
2. In the Letters folder in the Personnel Director Report List, navigate to the folder in which you want to create the new letter template.
3. Click the New Letter button, or select New>Letter from the File menu.
4. Select the Letter option, enter a name for the new letter, and click OK.



5. Enter any text and merge fields into the template you wish.

- To insert a merge field into your template, click in the document where you want to place the field. Click the Insert Merge Field button located on the toolbar in Microsoft Word and select a merge field.

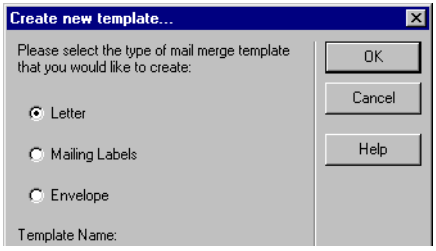
6. When you are finished, save the document normally. It will appear in the Personnel Director Letters folder.

To create a mailing label template

To create a Microsoft Word mailing label template, follow these steps:

1. Click the Letters button on the Personnel Director Tools toolbar.
2. In the Personnel Director Report List, click the Letters folder, then click the New button.
3. Click the Letters radio button, then type a name for your mailing label template and click OK.

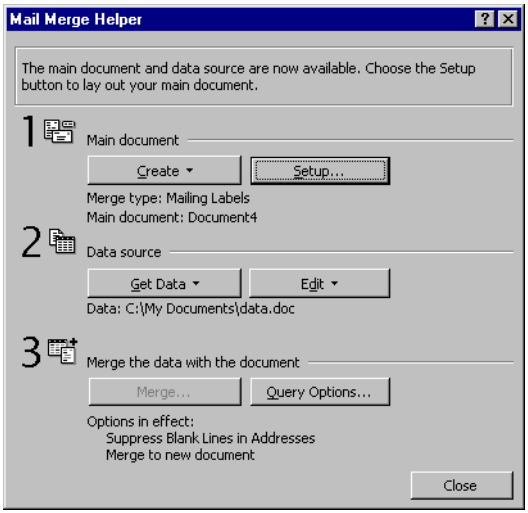
   The Create New Template screen appears.



4. Select the Mailing Labels option and click OK.

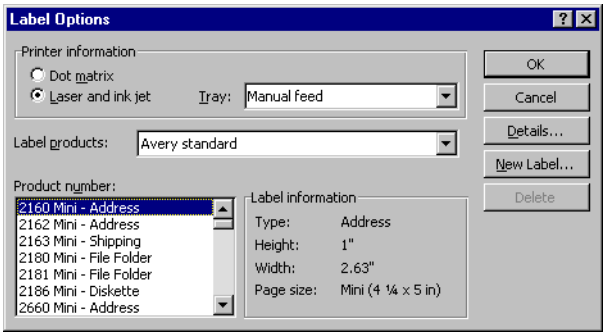
   Microsoft Word opens a blank document with the name you entered.

5. Select Mail Merge from the Word Tools menu.



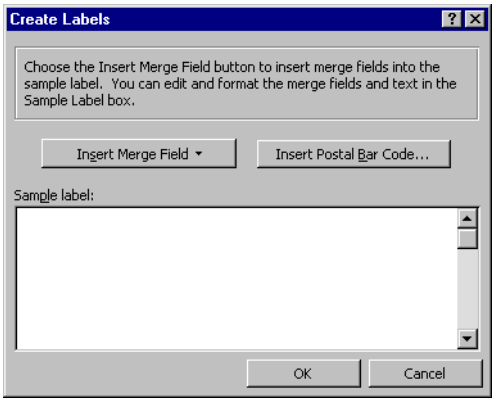
6. In the Mail Merge Helper, click the Setup button.

   The Label Options screen appears.



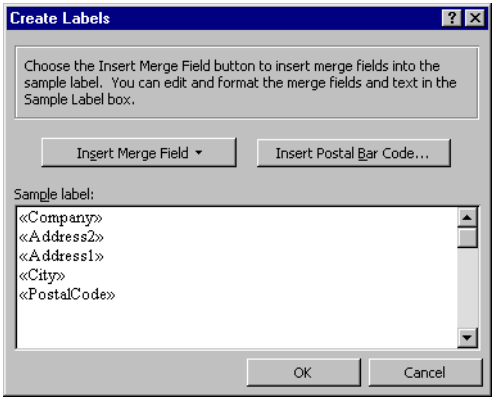
7. Select the printer, label, and label number that you want and click OK.

The Create Labels screen appears.


Create Labels
Choose the Insert Merge Field button to insert merge fields into the sample label. You can edit and format the merge fields and text in the Sample Label box.
Insert Merge Field
Insert Postal Bar Code...
Sample label:
OK
Cancel

8. Click the Insert Merge Field button and select the fields that you want to place on the label. To insert a postal bar code, click the Insert Postal Bar Code button. When all the fields are selected and positioned, click OK.

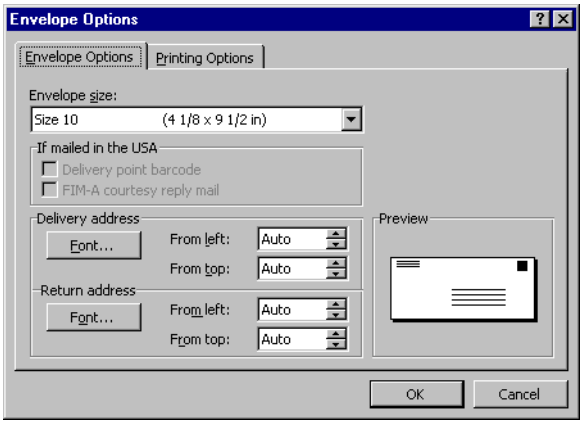
   Here is an example:



9. When you return to the Mail Merge Helper screen, click the Close button. This closes this screen so you can edit the label template. When you are finished, save the document as usual.

To create an envelope template

Creating a Microsoft Word envelope template is similar to creating a mailing label template; the only difference is that the Label Options screen is replaced by the following Envelope Options screen.



Follow the steps as explained in "To create a mailing label template" on page 319. The dialog displayed in step 6 is replaced by the Envelope Options screen shown above.

Using the Personnel Director Integrated Word Processor

This section describes the buttons and functions on the main toolbar and the formatting bar and the menu equivalents.

Word Processor Toolbar

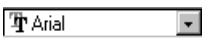
The following buttons appear on the word processor toolbar.

Button	Menu Access	Description	Shortcut
	File menu New	Create a new document	Ctrl+N
	File menu> Open document	Open an existing document	Ctrl+O

	File menu> Save	Save a document to disk	Ctrl+S
	File menu Print	Print a document	Ctrl+P
	File menu> Print Preview	Preview a document before printing	
	Tools menu Spelling	Check spelling	F7
	Edit menu Cut	Cut selected text	Ctrl+X
	Edit menu Copy	Copy selected text	Ctrl+C
	Edit menu Paste	Paste cut or copied text	Ctrl+V
	Edit menu Undo	Undo the last action	Ctrl+Z
	Edit menu Find	Find specified text	Ctrl+F
	Edit menu Replace	Replace text	Ctrl+H
	Insert menu Date	Insert the current date	

The Formatting Bar

Use the following buttons on the Personnel Director word processor Formatting bar.

Button	Menu Access	Description	Shortcut
	Format menu Font>Font	Select the font for text	
	Format menu Font>Size	Select the font size	
	Format menu Font>Colour	Select the font colour	

		Select the highlight colour	
	Format menu Font>Font style	Format selected text as bold	
	Format menu Font>Font style	Format selected text as italic	
	Format menu Font>Font style	Format selected text as underlined	
	Format menu Paragraph	Left-align selected text	
	Format menu Paragraph	Centre selected text	
	Format menu Paragraph	Justify selected text	
	Format menu Paragraph	Right-align selected text	
	Format menu Bullet Style	Format a bulleted list	

The Tables Bar

Use the following buttons on the Personnel Director word processor Tables bar to add and alter tables.

Button	Menu Access	Description	Shortcut
		Insert a table at the cursor	
		Add a row below the current row	
		Select the current row	
		Delete the selected row	
		Select the current column	

Working with the Document

To open an existing document:

1. Select Open from the File menu.
2. Select the path and filename.
3. Click the Open button.

To create a new document:

- Select New from the File menu.

To save a document:

1. Select Save from the File menu.
2. Type a name for the letter.
3. Click OK.

To print a document:

1. Select Print from the File menu.
2. Indicate the number of copies and other options.
3. Click OK.

To preview the document before printing:

1. Select Print Preview from the File menu.
2. Use the toolbar buttons to view and print the document:

Button	Description
	Exit Print Preview
	Display width of page
	Display length of page

	Zoom in
	Zoom out
	Print
	Change printer setup

To set up the page layout:

1. Select Page Setup from the File menu.
2. Provide the following information where required:

   Papersize

   Width. Type the width of the paper (in inches) or use the selection buttons.

   Height. Type the length of the paper (in inches) or use the selection buttons.

   To exchange the width and height, click the Flip button.

   Margins

   Top. Select or type the height of the top margin (in inches).

   Bottom. Select or type the height of the bottom margin (in inches).

   Left. Select or type the width of the left margin (in inches).

   Right. Select or type the width of the right margin (in inches).
3. Click OK.

To hide or show toolbars, the ruler, or status bar:

- From the view menu, select the item you want to hide or show. Items which are displayed have a checkmark beside the item. Select the item again to show (or hide) the item.

Editing the Document

To clear, copy, cut, and paste.

Edit Menu	Button	Action	Shortcut
Clear		Deletes the selected text or object.	
Copy		Copies the selected text or object to the clipboard.	Ctrl+C
Cut		Cuts the selected text or object and copies it to the clipboard.	Ctrl+X
Paste		Pastes the contents of the clipboard after the insertion cursor.	Ctrl+V

To undo the last action:

- Click the Undo button, select Undo from the Edit menu, or press Ctrl+Z.

To select the entire document:

- Select Select All from the Edit menu, or press Ctrl+A.

To find text:

1. From the Edit menu, select Find or press Ctrl+F.
2. Provide the following information:

   Find What. Type the partial word, whole word, phrase, or value you are looking for.

   Match Whole Word Only. Click this checkbox to locate only those occurrences that exactly match what you specified in Find What.

Match Case. Click this checkbox to locate only those occurrences with upper and lower case characters as specified in Find What.

Direction. Select the direction of the search: up or down from the current location.

3. To locate the next occurrence, click the Find Next button:

To replace text:

1. From the Edit menu, select Replace or press Ctrl+H.
2. Provide the following information:

   Find What. Type the partial word, whole word, phrase, or value you are looking for.

   Replace With. Type the partial word, whole word, phrase, or value to replace the occurrence.

   Match Whole Word Only. Click this checkbox to locate only those occurrences that exactly match what you specified in Find What.

   Match Case. Click this checkbox to locate only those occurrences with upper and lower case characters as specified in Find What.
3. Take one of the following actions:
   - To find the next occurrence, click the Find Next button.
   - To replace the selected occurrence, click the Replace button.
   - To replace all occurrences, click the Replace All button.

To check spelling:

1. Click the Spelling button, select Spelling from the Tools menu, or press F7.
2. Do one of the following:
   - To replace the incorrectly spelled word, select a word from the Suggestions list and click the Change button.
   - To display additional suggestions, click the Suggestions button.
   - To correct the spelling yourself, enter the text in the Change To field, then click the Change button.

- To ignore this occurrence of the incorrectly spelled word, click the Skip Once button or to skip all occurrences, click the Skip Always button.
- To correct the spelling yourself and add the corrected spelling to the list, type the correct spelling in Replace With and click the Add button.

3. To exit the Spell Checker, click the Close button.

To insert the current date:

- Click in the document where you want to place the date, then select Date from the Insert menu.

To insert a picture or other object:

1. Select Picture from the Insert menu.
2. Select the location and filename of the file you want to insert.
3. Click the Open button.

Formatting the Document

To select the font:

1. Select the text to be formatted.
2. Use the buttons on the Formatting toolbar

   -or-

   Select Font from the Format menu.
3. If you selected Font from the Format menu, provide the following information:

   Font. Select the font to be used from list.

   Font Style. Select the style of font from the list.

   Size. Select the size of font from the list.

Effects

Strikeout. Click this checkbox if a horizontal line (strikeout) is to appear in each character.

Underline. Click this checkbox if each character is to be underlined.

Color. Select the colour from the drop-down list.

Script. Select the type of script from the drop-down list.

4. Click OK.

To create a bulleted paragraph:

- Click the Bullet button on the Formatting toolbar or select Bullet Style from the Format menu.

  If you select Bullet Style from the Format menu, you can select from a range of bullet and number options. Select the required style and click OK.

- To turn off the bullet style, click the Bullet button on the toolbar.

To set the format for a paragraph:

Method 1:

- On the ruler, slide the Left and Right Indent icons to the positions desired. To set the Paragraph indent, slide the Paragraph Indent icon to the desired position.

Method 2:

1. Select Paragraph from the Format menu.
2. Provide the following information:

   Alignment. Select alignment of the paragraph. Choose from Left, Right, Center or Justified.

   Indentation

   Left. Select or type the number of inches the paragraph is to be indented from the left margin.

   Right. Select or type the number of inches the paragraph is to be indented from the right margin.

Indent. Select or type the number of inches the first line of the paragraph is to be indented from the paragraph's left margin.

Spacing

Before. Select or type the number of inches to be inserted before the previous paragraph.

After. Select or type the number of inches to be inserted before the next paragraph.

Line Spacing. Select the type of line spacing. Choose from: Multiple, At Least, or Exactly.

Value. Select or type the number of lines to be used in line spacing.

3. Click OK.

Inserting a table:

1. At the paragraph where you want the table inserted, on the Tables toolbar, click the Create Table button.
2. Drag the cursor over the grid until you highlight the desired number of columns and rows, then click the Checkmark button.

   The table appears in the document.
3. Adjust the table if necessary:
   - To add a row, place the cursor on the row below where you want the new row to appear, and click the Insert Row button.
   - To delete a row, insert the cursor in the row and click the Select Row button. Then click the Delete Row button.
   - To select a column, insert the cursor in the column and click the Select Column button.

Setting Tabs:

- Click the ruler at the location where you want to set the tab. To remove the tab, click the Tab icon.

15 WORKING WITH GRAPHS

Overview

Personnel Director comes with its own integrated graphing module, so you can create professional-looking charts and quickly tailor graphs for impressive personnel presentations and reports. You can even add 3-D effects for those graphs that need special impact.

Displaying a Graph

1. To display existing graphs, do one of the following:
   - On the Tools toolbar, click the Reports button.

     – or –

   - Select Reports from the Tools menu.

   The Personnel Director Report List appears. For instructions on how to use Report List, see chapter 13 “Working with Personnel Director Report List” on page 297.
2. Open the folder that contains the graph and select the graph you want to see.

3. Double-click the graph, or click the Preview button on the Report List toolbar.

   -or-

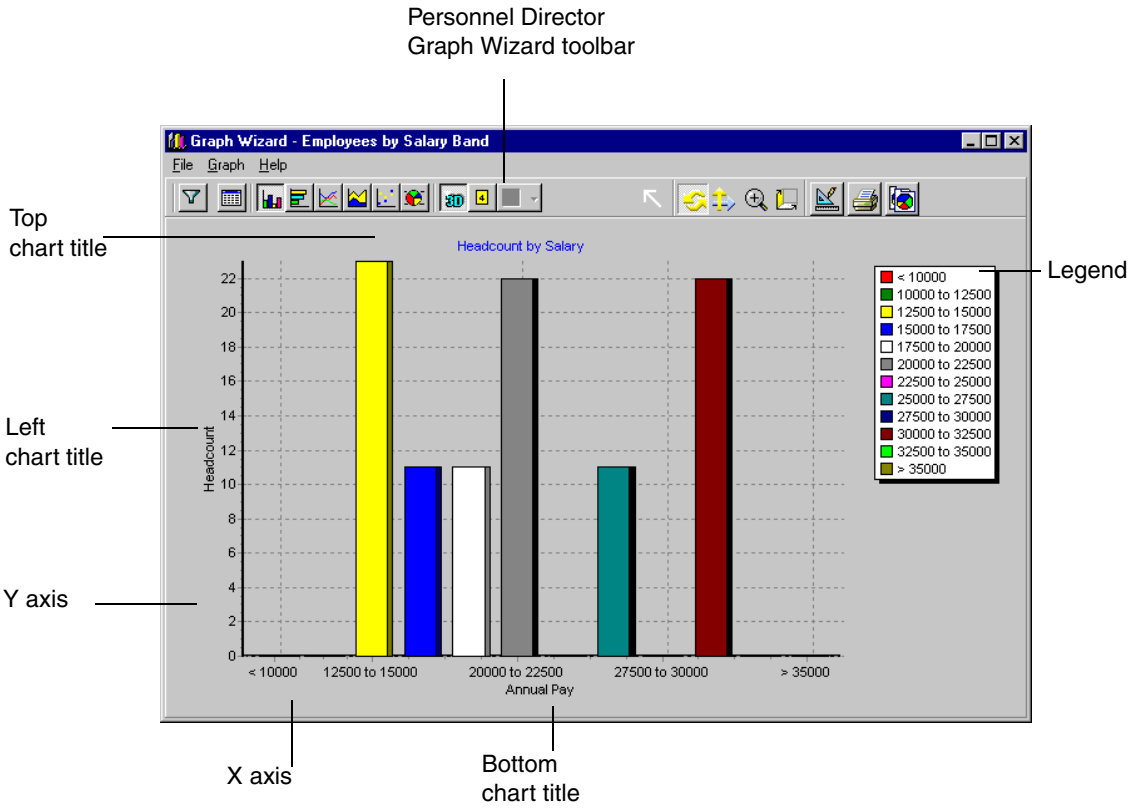
   Select Preview from the Personnel Director Report List File menu or Open from the shortcut menu.

   The Personnel Director Graph Wizard appears.

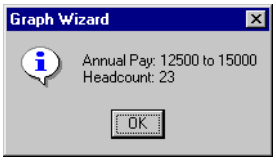
Note: *To return to the Report List, click the window close button in the Graph Wizard window.*

About the Graph Wizard Window

When you create or open a graph, the associated data is graphed and displayed in the Personnel Director Graph Wizard window. You can quickly change the type of graph displayed, and its title and axis labels.



If you click in the bar of a bar chart or on the point in a scatter chart, the value will display. For example, if you click the bar representing employees with annual pay between 12500 and 15000 pounds, "Annual Pay: 12500 to 15000" and "Headcount 23" is displayed.



The Graph Wizard Toolbar

The Graph Wizard toolbar contains buttons you can use to select a graph type, enhance a graph, and add graph elements.

Click one of the following buttons on the Graph Wizard toolbar to set up graphs, save and filter graph information, view graph data and create graph titles.

	Save the graph.
	Define the graph contents and set up graph properties.
	Filter the graph data.
	Add or change the text in graph titles.
	Display source data for the graph.

Click one of the following buttons on the Graph Wizard toolbar to define the graph contents and change the type of graph displayed.

	Display a vertical bar chart.
	Display a horizontal bar chart.
	Display a line graph.
	Display an area chart.
	Display a point scatter chart.
	Display a pie chart.

Click one of the following the buttons on the Graph Wizard toolbar to add graph elements and enhance the graph display.

	Apply a 3D effect.
	Mark the graph bars or points with numeric labels
	Change the stacking of 3-axis graphs. (The graph must be 3-axis.)
	Rotate a graph (The graph must be 3D).
	Move a graph in the graph window.
	Zoom a graph in the graph window.
	Change the depth of the graph. (The graph must be 3-D.)
	Edit graph properties.

Click one of the following the buttons on the Graph Wizard toolbar to manage the graph file.

	Print the graph.
	Copy the graph to the clipboard for copying into another application.

Creating Graphs with the Wizard

You can create new graphs quickly and easily with the Personnel Director Graph Wizard. The following examples show how to create a graph using the Personnel Director Graph Wizard.

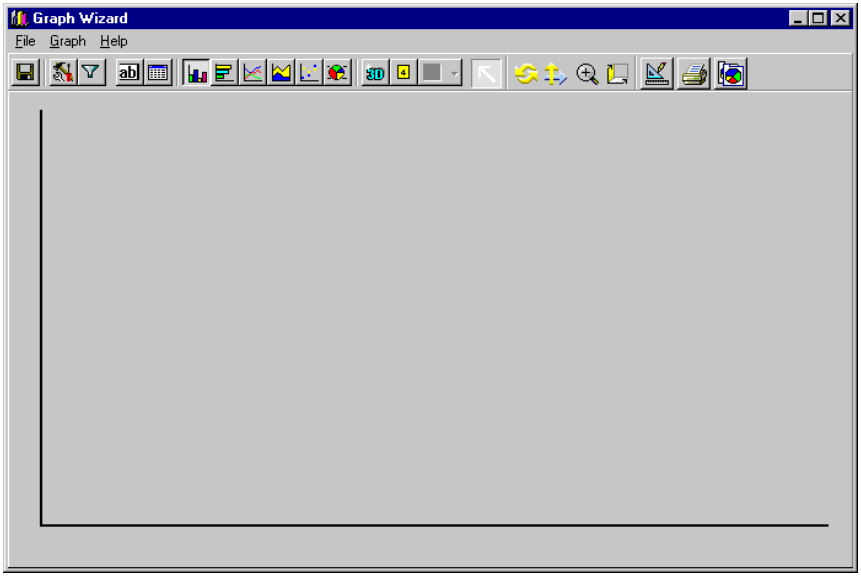
Example 1: Number of Employees by Department

This example describes how to create a graph that shows the number of employees in each department. The vertical axis of the graph will display the number of employees and the horizontal axis will display the department name.

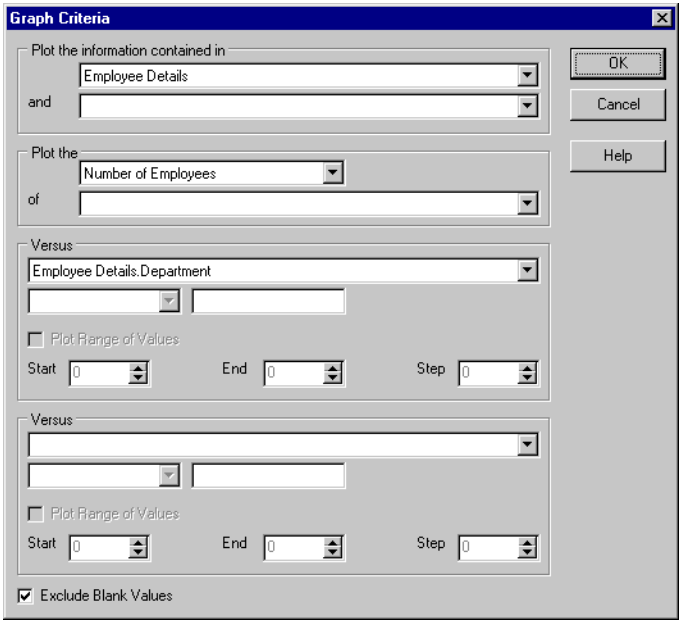
1. Click the Reports button on the Tools toolbar.

2. Click the New Graph button.

   The Graph Wizard appears.

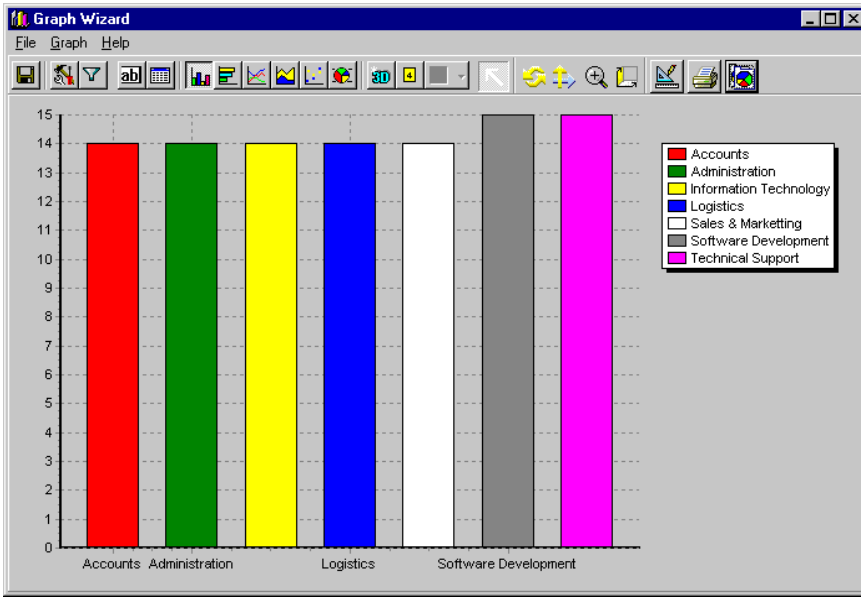


3. From the Graph menu, select Graph Setup or click the Graph Setup button on the toolbar.

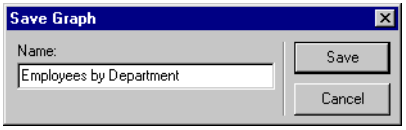


4. On the Graph Criteria screen, select the type of data to graph.
   - From the first Plot the Information Contained In drop-down list, select Employee Details. This is the table on which to base the graph.
   - From the Plot The drop-down list, select Number of Employees. This is the information that will appear on the X-axis of the graph.
   - From the Versus drop-down list, select Employee Details.Department. This is the information that will appear on the Y-axis of the graph.
5. Click the Exclude Blank Values checkbox. This ensures that employees not assigned to a department are not included in the graph.
6. Click OK.

The graph appears in the Personnel Director Graph Wizard.



- Use the Personnel Director Graph Wizard features to view and change the appearance of the graph as desired.
- When you are finished, click the Save button to save the graph.



- Type a name for the graph and click the Save button.

Example 2: Employees by Range of Pay Category

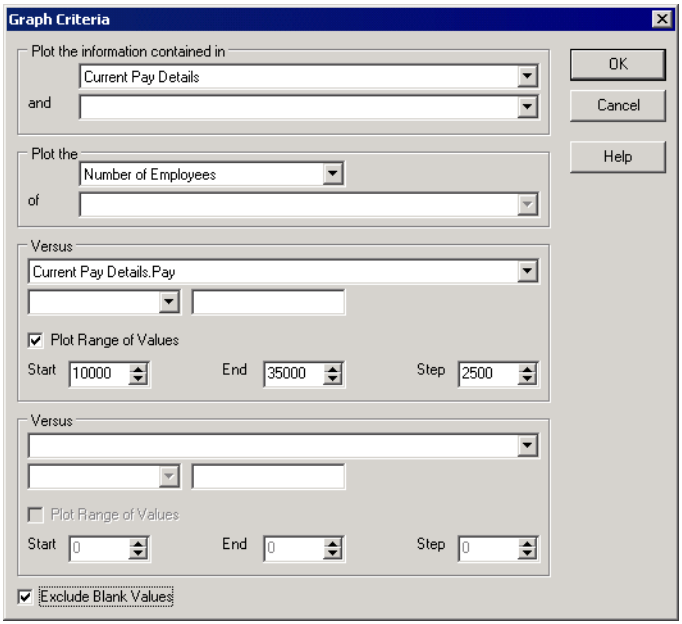
In this example, learn how to create a graph that shows the number of employees that fall within a certain pay range. You can plot a range of values for any field that contains numeric data, such as pay or holiday allowances. In this example, the number of employees versus the pay ranges into which they fall is plotted. The pay ranges from 10,000 to 35,000 are graphed, with each range stepped in increments of 2,500.

1. From the Report List, click the New Graph button.

   The Graph Wizard appears.

2. From the Graph menu, select Graph Setup or click the Graph Setup button on the toolbar.

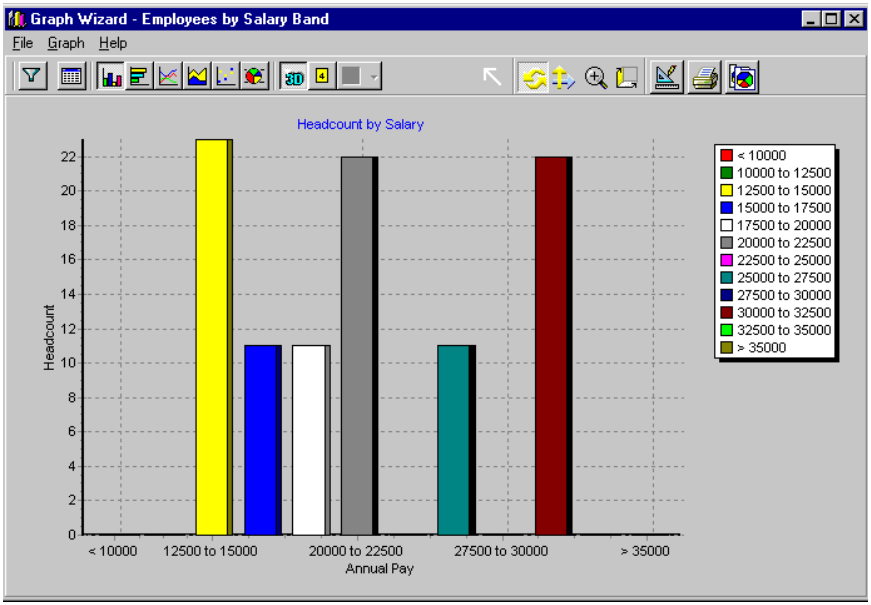
3. Complete the graph criteria as follows:



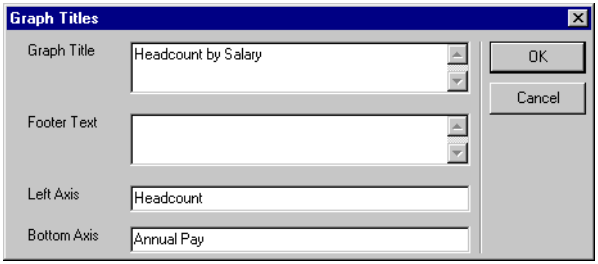
- From the first Plot the Information Contained In drop-down list, select Current Pay Details. This is the table on which to base the graph.
- From the Plot The drop-down list, select Number of Employees. This is the information that will appear on the X-axis of the graph.

- From the Versus drop-down list, select Employee Details.Pay. This is the information that will appear on the Y-axis of the graph.
- Check the Plot Range of Values checkbox to indicate that you want to specify a range of pay values.
- In the Start field, enter 10000, to indicate that you want the graph to include pay values beginning with 10,000 pounds.
- In the End field, enter 35000, to indicate that you want the graph to include pay values ending with 35,000 pounds.
- In the Step field, enter 2500, to indicate that you want the graph to show the pay ranges in increments of 2,500 pounds.
- Check the Exclude Blank Values checkbox to exclude employees not within the pay range you specified.

4. Click OK.



5. To add the titles shown above to the graph, click the Graph Titles button.



- Enter the Graph Title as Headcount by Salary.
- Enter the Left Axis label as Headcount.
- Enter the Bottom Axis label as Annual Pay.

Example 3: Number of Employees by Age and Division

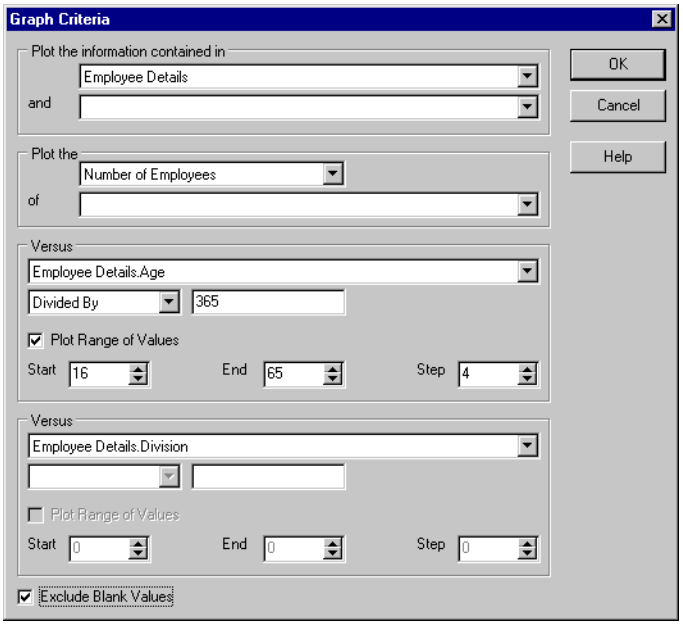
This example is a more advanced one that produces a 3-axis graph. It plots the number of employees within each age range by division. Age is stored in days within Personnel Director, so to make the graph easier to read, you can divide the age by 365 days to show the age in years.

1. From the Report List, click the New Graph button.

   The Graph Wizard appears.

2. From the Graph menu, select Graph Setup or click the Graph Setup button on the toolbar.

3. Complete the graph criteria as follows:

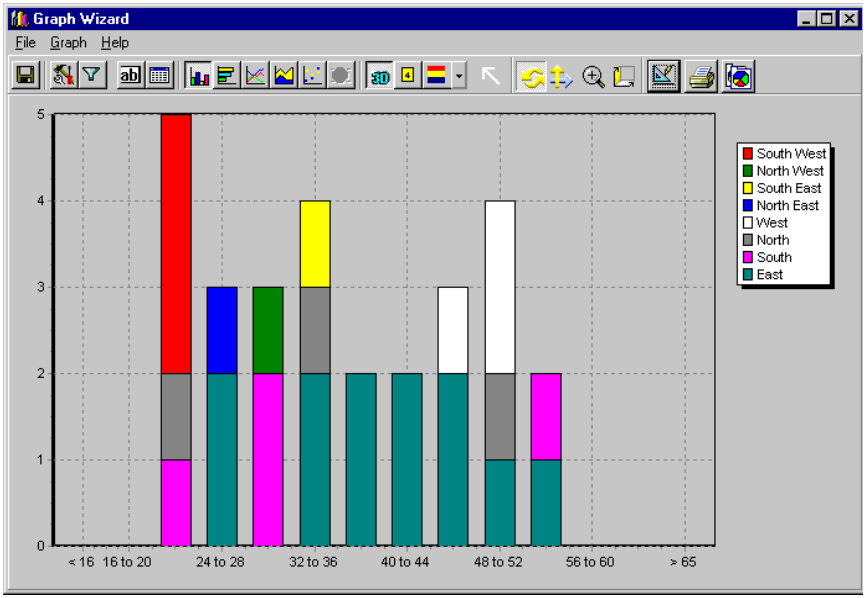


- From the Plot the Information Contained In drop-down list, select Employee Details. This is the table on which to base the graph.
- From the Plot The drop-down list, select Number of Employees. This is the information that will appear on the Y-axis of the graph.
- From the Versus drop-down list, select Employee Details.Age. This is the information that will appear on the X-axis of the graph.
- Click the drop-down list button in the field below Employee Details.Age, and select Divided By. Then enter 365 in the text box to the right of the field. This will display the ages in years rather than days.
- Check the Plot Range of Values checkbox to indicate that you want to specify a range of age values.
- In the Start field, enter 16, to indicate that you want the graph to include age values beginning with 16.
- In the End field, enter 65, to indicate that you want the graph to include age values ending with 65.

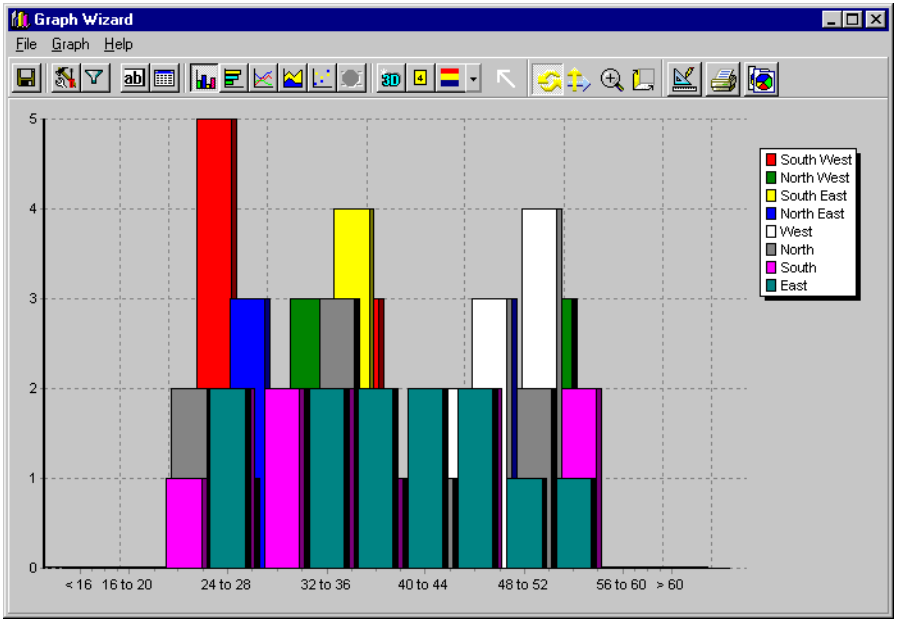
- In the Step field, enter 4, to indicate that you want the graph to show the age ranges in increments of 4 years.
- From the second Versus drop-down list, select Employee Details.Division to create the third axis for the graph.
- Check the Exclude Blank Values checkbox to exclude employees not within the pay range you specified.

4. Click OK.
5. When you first display this graph, the stacking option is selected, which makes the graph more difficult to read.

6. Click the Stacking button and select None.



This graph looks particularly impressive in 3D. Simply click the 3D button.



Working with Graphs

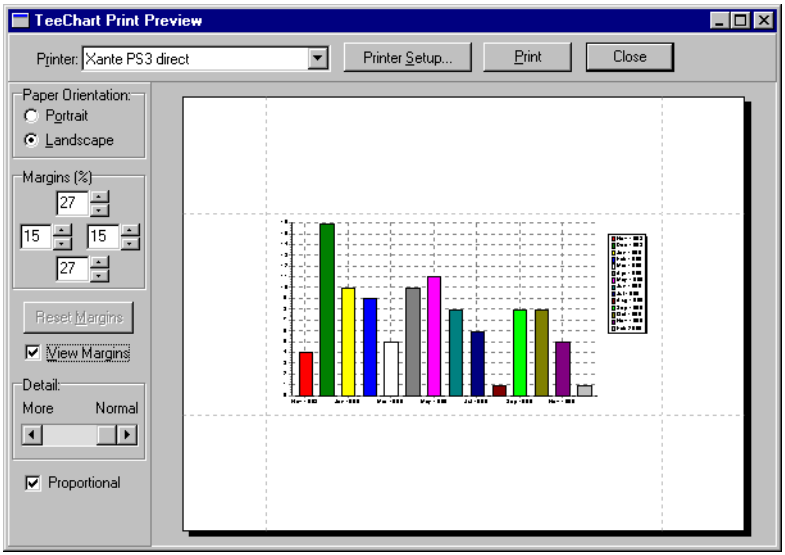
To open, close, rename, and preview graphs, see “Managing Report, Letter and Graph Files” on page 300.

Saving Changes to a Graph

- To save changes you made to the graph, click the Save button on the toolbar.

Printing the Graph

- To print the graph, click the Print button on the toolbar.



- To select a different printer or change the print options, click the Printer Setup button in the Preview window.
- To change the orientation on the page, click the Portrait or Landscape button.
- You can also use the Margin controls to increase or decrease the margins and drag the margin guides to see the effect. Click the View Margins button to turn on and off the display of the margin guides.
- Click the Proportional checkbox to position the graph in proportion to the margins and page size.
- When you are finished, click Close.

Changing the Graph Type

Click one of the following the buttons on the Graph Wizard toolbar to change the type of graph displayed.

	Display a vertical bar chart.
	Display a horizontal bar chart.
	Display a line graph.
	Display an area chart.
	Display a point scatter chart.
	Display a pie chart.

Applying 3-D Effects

You can create or enhance impressive graphs using the 3-D effect. Special effects can also be added using the rotate and depth functions.

To turn on a 3-D effect:

- Click the 3-D button on the toolbar.

To rotate a 3-D effect:

1. Click the Rotate button on the toolbar.
2. Click and drag in the direction in which you want to rotate the chart until you get the desired effect.

To increase the depth of a 3-D bar chart:

- Click the Depth button on the toolbar. Click and drag until you get the desired effect.

Moving and Zooming Graphs

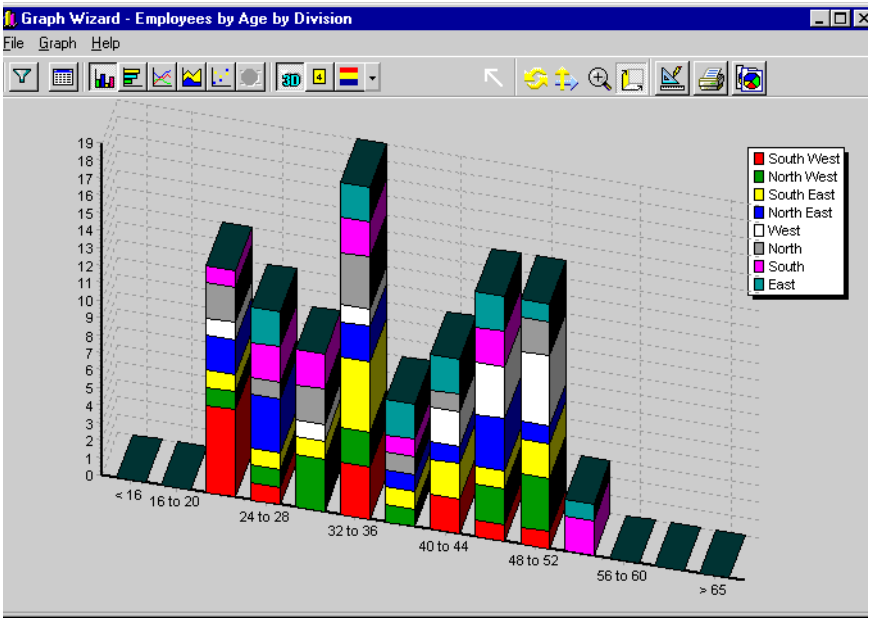
When you work with 3-D and rotated views of complex graphs, you may want to zoom out to get a better overall view and move the resized graph.

To move a graph within the graph window:

- Click the Move button on the toolbar. Click and drag to change the position of the graph within the window. This is useful when you have rotated and zoomed a graph and want to adjust the entire grid to centre it within the window.

To zoom the graph:

- Click the Zoom button on the toolbar. Click and drag to zoom in and out.
- The following screen illustration shows a rotated 3-D bar graph with added depth. It has been zoomed out and moved to re-position it within the window.



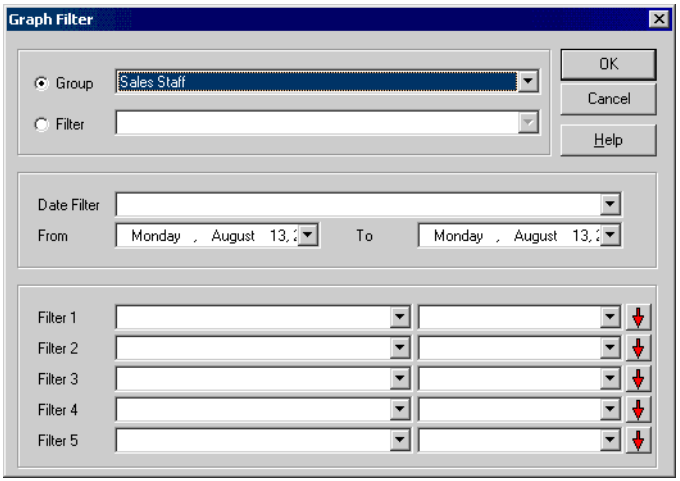
Filtering Graphs

To exclude specific data from your graph, you can set a filter.

Note: *You can save the filter if, when exiting the graph, you confirm that you want it saved with the graph.*

1. Select Filters on the menu bar.

   The Graph Filters screen is displayed.



2. Identify the employees you want to include in the graph:
   - To identify the employees by group, click the Group drop-down list and select the name of the group.
   - To identify the employees by filter, click the Filter drop-down list and select the name of the filter.
3. Identify the dates you want to include in the graph:
   - To select the date to be used for filtering, select the name of the field from the Date Filter drop-down list.
   - To set a date range, select or type the range in the From and To fields.
4. Set up to five additional filters. For each filter:
   - Select the field to be used. Select the name of the field from the first Filter drop-down list (first field for the filter).

- To set the associated value, select the value in the second Filter drop-down list (first field for the filter).

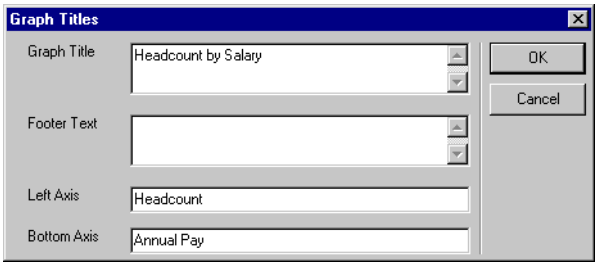
5. Click OK.

Changing Chart Titles and Adding Markers

You can add, change or remove the top, bottom, and side titles on the chart.

1. Click the Titles button on the toolbar.

   The Edit Titles screen appears.



2. Do one or more of the following:
   - To add or change a title, click in the location (Top, Left, Right, or Bottom) and type the title you want.
   - To remove a title, click in the location (Top, Left, Right, or Bottom) and delete the title.
3. Click OK.
4. To add markers to bars, areas, or points on a graph:

   - Click the Markers button. The markers show the numbers represented by the graph element.

Changing Chart Properties

To fine tune the graph display, use the additional controls available from the Edit Chart button on the toolbar.

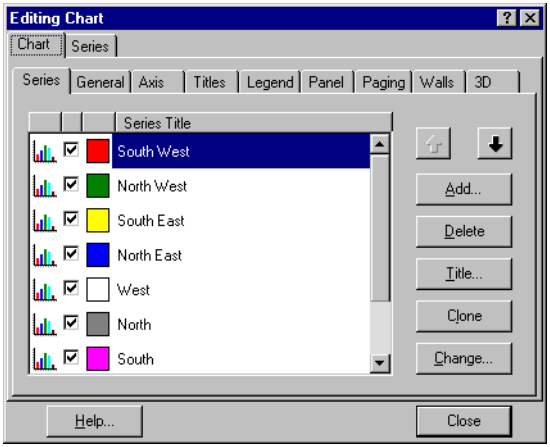
***Note**: You can use the same techniques to change the graph properties of a graph you have added in a report.*

Changing Graph Type (Series) Properties

You can add custom graph types (called series), create series titles, and edit, delete and duplicate a series.

1. Click the Edit Chart button on the toolbar.

   The Editing Chart screen appears



2. To change Series attributes on the Series tab:
   - To add a chart type, click the Add button on the Series tab. Double-click a chart type to add it to the Series tab.
   - To add a title to the new Series, click the Title button and type a chart name.
   - To delete a selected series, click the Delete button, then click Yes to confirm.
   - To duplicate a selected series, click the Clone button. A duplicate is created. Use the Title button to change the title.

Changing General Attributes

1. To change the general attributes of the chart, click the General tab and do one or more of the following:
   - Click the Print Preview button to see what the chart will look like when it prints.

- Click the Export button to export chart data to another program.
- Click the Clip Points checkbox to prevent overlapping elements on the chart.
- Use the Margins pointers to change the margins of the graph display in pixels.
- To control the Zoom feature, use the Zoom checkbox to turn zooming on or off. Click Animated Zoom in an animated sequence. To change the number of steps in the sequence, enter the step number.
- To control chart scrolling, select the radio button that describes the type of scrolling you want.

Changing Axis Attributes

- Click the Axis tab to change chart axis attributes.
  - Click Show Axis to turn on and off the display of the axes.

Changing Title Attributes

1. Click the Titles tab to change chart title attributes.
   - To add a title, click the Visible button, then type the title in the text box. Click Adjust Frame to position the title within a frame.
   - To change the font, click the Font button, then select the font and font properties and click OK.
   - To add a border to the title, click the Border button. Click Visible. Then set the border width, style and color.
   - To change the background colour of the title, click the Back Color button, select a colour and click OK.
   - To change the pattern of a coloured background, click the Pattern button, select a style and click OK.
   - To change the position of the title, click an Alignment button.

Changing Legends Attributes

1. Click the Legend tab to change the chart legend attributes.
   - Click the Visible button, to turn on and off the legend display.
   - To change the font, click the Font button, then select the font and font properties and click OK.
   - To add a frame to the legend, click the Frame button. Set the border width, style and color and click OK.
   - To change the background colour of the legend, click the Back Color button, select a colour and click OK.
   - To change the position of the title, click a Position button.
   - Leave the legend style set to Automatic to display the selected graph criteria, or select a series style for a custom series.
   - To change the text style, select a style from the drop-down list.
   - To put a shadow color behind the legend, click the Shadow Color button and select a width.
   - To alter the position of the legend by a percentage or change the colour bar width, use the %Top Pos and %Color Width controls. Click the Resize Chart checkbox to resize the chart as you change the legend position and width. Click the Inverted checkbox to vertically flip the legend.

Changing Panel Attributes

1. Click the Panel tab.
   - Click a Bevel Inner radio button to add a 3D bevel effect to the inner edge of the chart. Click a Bevel Outer radio button to add a 3D bevel effect to the outer edge of the chart. Use the Width control to adjust the width of the bevel.
   - To change the entire graph panel background colour, click the Panel Color button.
   - To fill the back panel with a gradient fill, click the Gradient Visible checkbox. Then click the Start Color and End Color buttons to adjust the fill colours. Use the Direction drop-down list to adjust the direction of the gradient fill.

- To add a back image similar to wallpaper to the panel, click the Browse button under Back Image, then select the file to use as background and adjust it by selecting a Style button.

Changing Paging Attributes

1. Click the Paging tab.
2. Set the number of points per page. Use the Next and Last buttons to see the page range. Select Scale Last Page to scale the distribution of the points on the last page.

Changing Wall Attributes

For 3D charts only, you can select colours, borders and patterns for the left side, bottom, and back wall of the chart.

1. Click the Walls tab.
2. Adjust the left, bottom, and back wall background, border and pattern attributes by clicking the appropriate button.

Changing 3D Attributes

1. Click the 3D tab.
   - Click the 3D checkbox to turn the 3D view on and off. Use the 3D% controls to adjust the degree of 3D display. Click the Orthogonal checkbox to turn rotation on and off.
   - Use the Zoom, Rotation, and Elevation sliders to adjust the zoom level for points.
   - Use the Horiz. Offset and Vert. Offset sliders to position 3D graphs horizontally and vertically within the chart window. If Orthogonal is not selected, you can use the Perspective slider to change the perspective.

Changing the Data

You can change the data used to generate the graph.

1. Click the Graph Setup button or select Graph Setup from the Graph menu.

   The Graph Criteria screen appears.

2. Change any of the graph criteria and click OK.

Exporting a Personnel Director Graph

You can export a graph as a Windows bitmap, Windows metafile, Windows enhanced metafile, or as a TeeChart.

1. Click the Edit button on the toolbar.
2. Click the General tab.
3. Click the Export button.

   The Export Chart screen appears.

4. Click the radio button for the type of file if you are exporting to a file. Then click the Save to File button.
5. Select the drive and directory location for the exported file.
6. Click Save.

Copying the Graph to the Clipboard

To place the graph in a report or online presentation, you can copy the graph to the clipboard and then paste it into your presentation.

1. To copy the graph to the clipboard, click the Copy button on the toolbar.
2. To insert it in your presentation, open the presentation, click the position where it is to appear, and select Paste from the Edit menu. (If this instruction does not work, check the documentation for your application.)

16 CREATING QUERIES

There may be times when you want to extract information from Personnel Director that is not easily located by using the find, search or filter tools or that is not contained in any of the predefined reports or queries. For example, you might want to view or print a list of staff names and their dates of birth, or view or report on the officers that updated the accident book.

To do this, you can create a query to extract data directly from Personnel Director tables:

- For display and selection purposes. You can also export data to File, HTML or Microsoft Excel formats. This cannot be done from a report.
- For report generation.

The easiest way to query Personnel Director databases is to use the Query Wizard. More advanced users can use the Query Designer to create and modify queries without the step-by-step assistance of the Query Wizard. For more information, see “Editing a Query With the Query Designer” on page 377.

Important Notes About Security

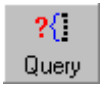
Tables and Fields. If your user account does not permit you to access certain tables or fields, you cannot access them when using Query Designer. You cannot view a query or report that contains tables or fields you do not have access to.

Employee Security. Employee security is automatically applied to queries.

For full details about setting security, see chapter 3 “Setting Up Security” on page 35.

Creating a Query for Display and Selection

Follow these steps to create a database query. If you are creating a query to extract data for a report, see the following section, "Creating a Query for a Report".



1. Click the Query button on the Tools toolbar.
2. Click the New button.
3. Double-click the Query Wizard button or click OK.
4. When the query is complete, the results appear in the Preview Data window. Click OK to close the window.
5. The query results appear in the Query Designer window. Click the window close button, then click Yes to save the changes.
6. The query now appears in the Query list, where you can select it to view the results, edit it, or delete it.

Creating a Query for a Report

You use the same Query Wizard to query the database for data to include in a report; the only difference is that once the query is complete, you use the Design tab in the Report Builder window to lay out the report.

1. Click the Reports button on the Tools toolbar.
2. In the Report List window, click the New Report button.
3. Double-click the Query Wizard button or select the Query Wizard and click OK.
4. When the query is complete, the results appear in the Preview Data window. Click OK to close the window.
5. The query results appear in the Query Designer window.
6. Click the Design tab. From the File menu, select New. Double-click the Report Wizard button or click OK.

Query Examples

There are two types of queries:

Simple. These queries use one or more tables that may or may not have search criteria, but do not contain calculations.

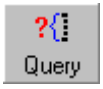
Summary. These are queries that use functions (average, sum, minimum, maximum or count) to calculate statistics grouped by other fields; for example, Headcount by Department or Average Age by Gender.

This section illustrates a number of examples showing how to create simple or summary queries.

Simple Query Examples

Example 1: A Query with One Table and No Selection Criteria

This example is the simplest query you can build — it uses only one table and has no selection criteria. This example queries the Employee Details table for the Employee Number, Post Name and Department fields.

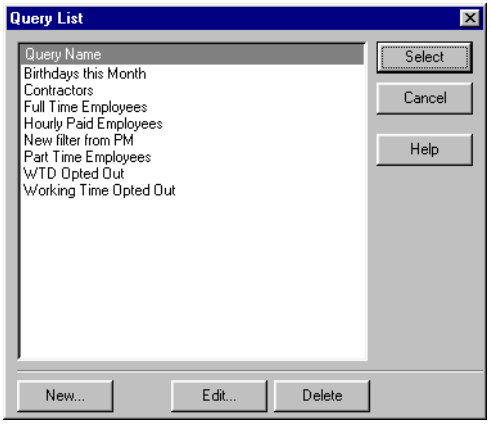


1. Click the Query button on the Tools toolbar.

   -or-

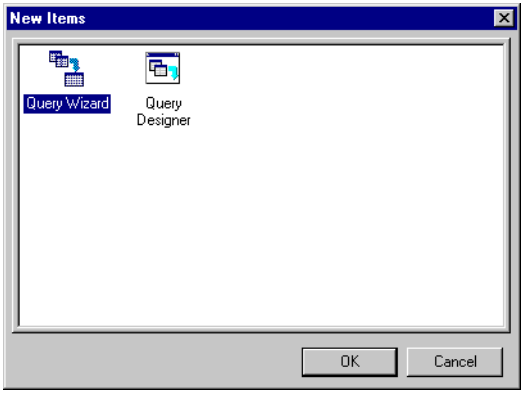
   Select Query Database from the Tools menu.

   The Select Query screen is displayed.



2. Click the New button.

   The New Items screen is displayed in the Report Builder.

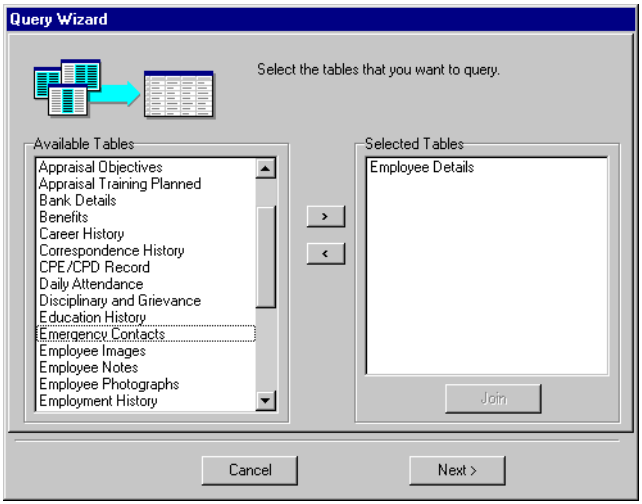


3. Double-click the Query Wizard icon.
4. Select the database tables to include in the query.

- Click the Add button to add a selected table or tables to the selection list on the right.

- Click the Remove button to remove a selected table or tables from the list on the right.

In this example, you want to include information from only the Employee Details table. Select the **Employee Details** table and click the Add button.



5. Now that you have selected the table, click the Next button.
6. Select the fields to include in the query.

   You have the option of including all fields or only fields you select. In this example, we want to include specific fields, so click the Choose Fields option.

   Use the following buttons to add or remove fields you select from the list.

   - Click the Add button to add a selected field or fields to the selection list on the right.

   - Click the Add All button to add all fields to the selection list on the right.

   - Click the Remove button to remove a field or fields from the list on the right.

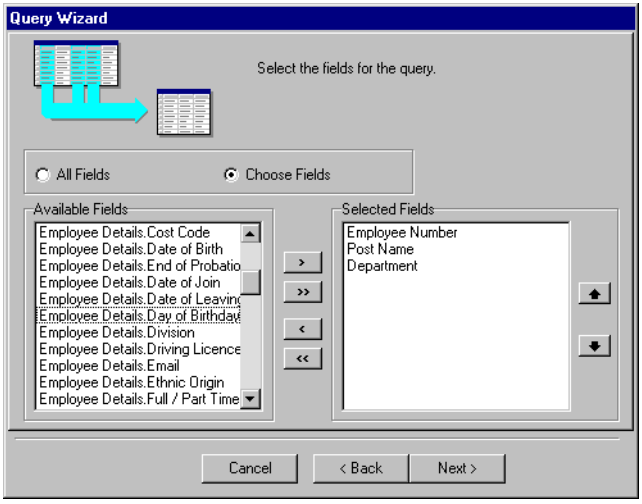
   - Click the Remove All button to remove all fields from the list on the right.

   Use the up and down buttons on selected fields to resequence the list.

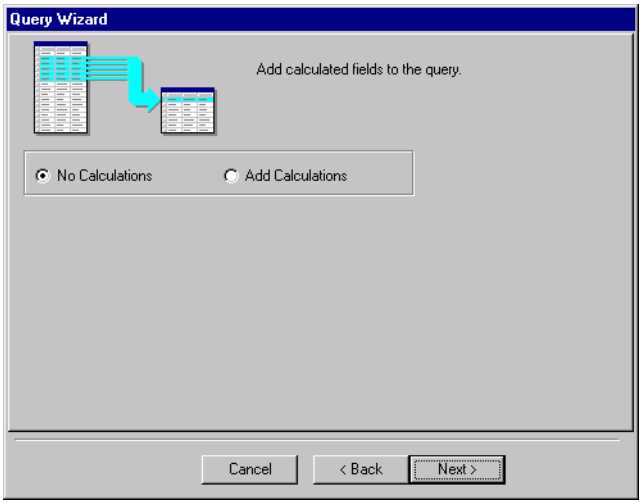
   - Click the Up button to move a selected field up the list on the right.

   - Click the Down button to move a selected field down the list on the right.

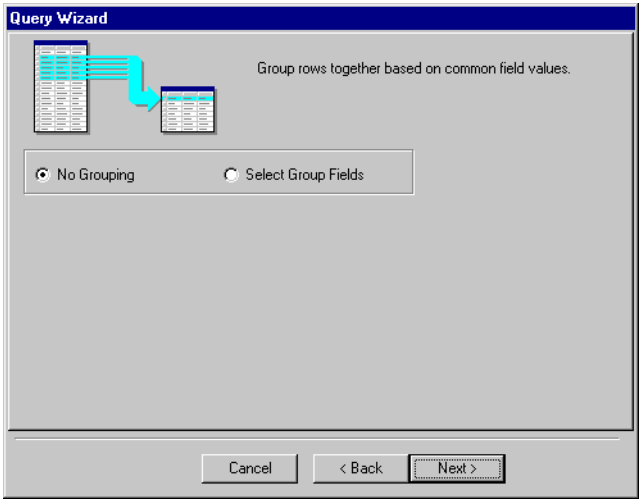
   To show information about each employee add the **Employee Number**, **Post Name** and **Department** fields.



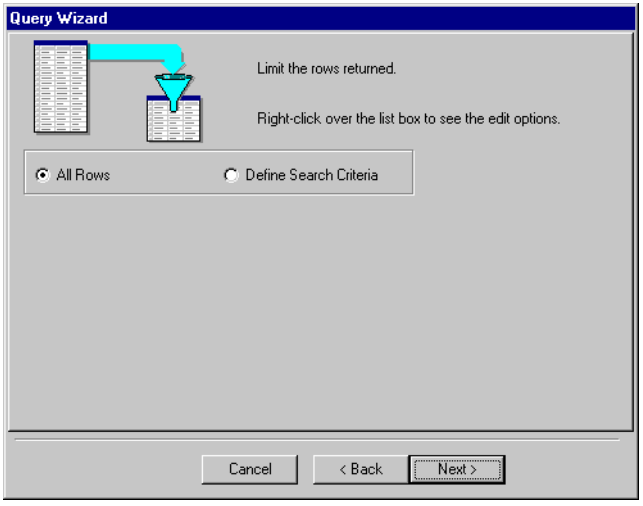
7. Now that you have selected the fields for the query, click the Next button.
8. Indicate whether or not there are calculations to be included in the query. In this example, there are no calculations, so click the No Calculations option.



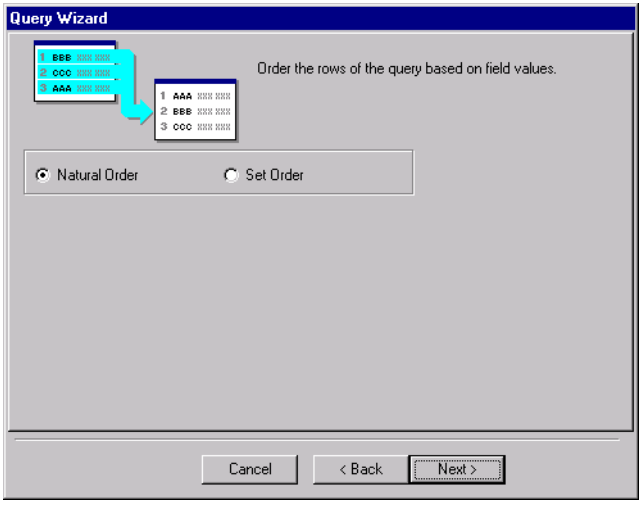
9. Click Next. Indicate whether or not grouping is required in the query. In this example, there is no grouping, so click the No Grouping option.



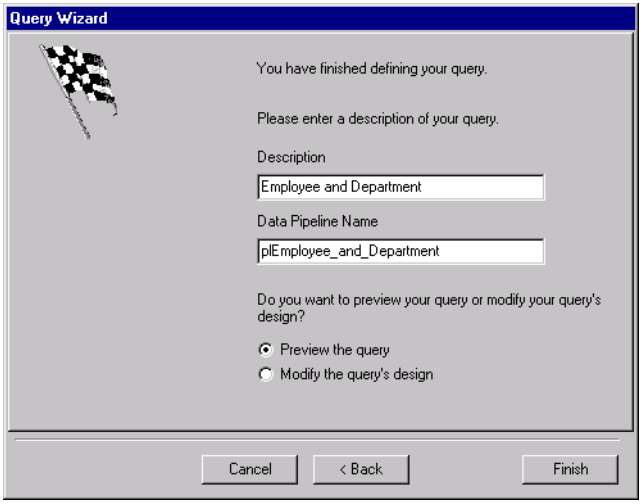
10. Click Next. Indicate whether or not selection criteria is required. In this example, we want all employees listed, so click the All Rows option.



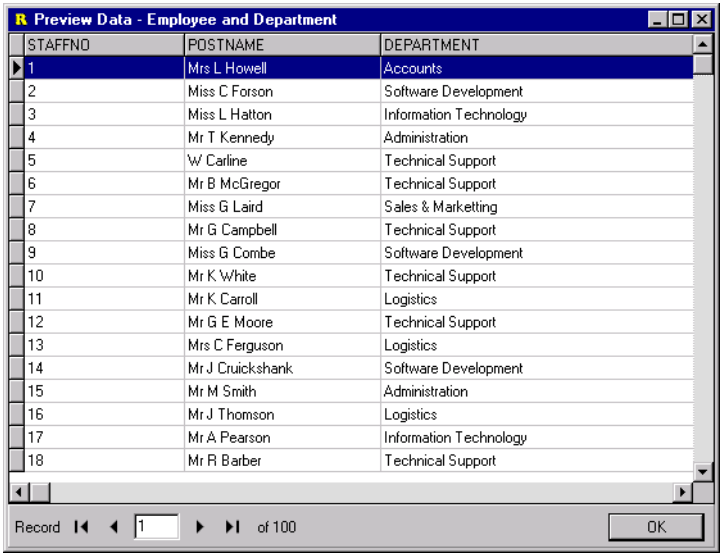
11. Click Next. Indicate the sorting criteria. In this example, we want ascending order (A-Z), so click the Natural Order option.



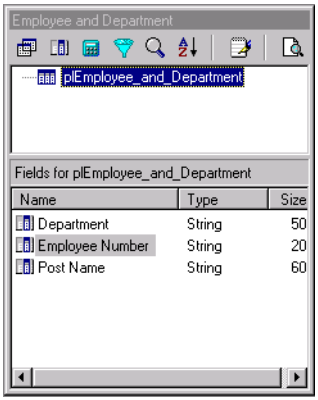
12. Click Next. Type the name of **Employee and Department** in the Description field for this query and select the option to preview the results.



13. Click Finish. The Preview Data screen appears, displaying the results of the query.


Preview Data - Employee and Department
STAFFNO
POSTNAME
DEPARTMENT
1 Mrs L Howell Accounts
2 Miss C Forson Software Development
3 Miss L Hatton Information Technology
4 Mr T Kennedy Administration
5 W Carline Technical Support
6 Mr B McGregor Technical Support
7 Miss G Laird Sales & Marketting
8 Mr G Campbell Technical Support
9 Miss G Combe Software Development
10 Mr K White Technical Support
11 Mr K Carroll Logistics
12 Mr G E Moore Technical Support
13 Mrs C Ferguson Logistics
14 Mr J Cruickshank Software Development
15 Mr M Smith Administration
16 Mr J Thomson Logistics
17 Mr A Pearson Information Technology
18 Mr R Barber Technical Support
Record 1 of 100
OK

14. Click OK to close the screen. The Query screen appears on the Data tab of the Report Builder.

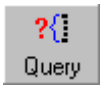


15. Save the Query.
    - Click the Close Window button in the upper right corner of the Report Builder screen.
    - Click Yes to confirm that you want to save the query. Type a name for the query and click the Save button.

Example 2: A Query with Two Tables and Selection Criteria

This example is slightly more complex. It queries two tables and has selection criteria. In this example, we create a query to display absence records that occurred in 1999, along with the employee details for the absence. The query results will be similar to this:

Employee Number	Post Name	Start Date	Days Lost	Category
001	Mr M Donaghy	17/01/1999	16	Holiday
001	Mr M Donaghy	06/02/1999	7	Sickness
007	Mrs J. Woodbridge	27/08/1999	3	Holiday



1. Click the Query button on the Tools toolbar.

   -or-

   Select Query Database from the Tools menu.

   The Select Query screen is displayed.

2. Click the New button.

   The New Items screen is displayed in the Report Builder.

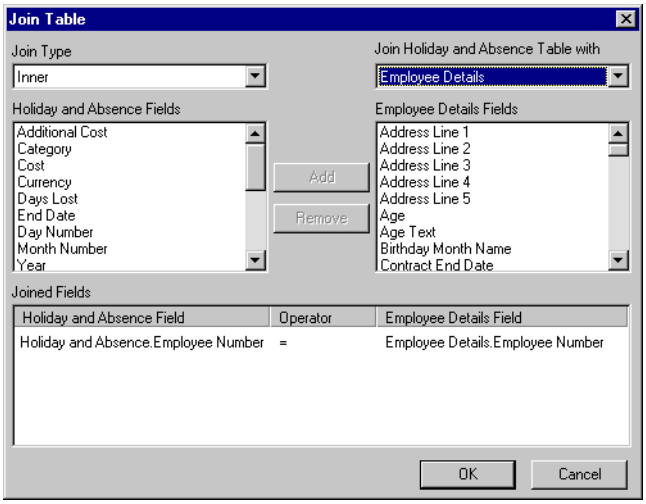
3. Double-click the Query Wizard icon.

4. Select the database tables to include in the query.

   Tip: *Most queries will include the Employee Details table as this contains details such as the Employee Number as well as the employee's name (Post Name) and Address.*

   In this example, you want information from two tables: the **Employee Details** and **Holiday and Absence**.

   When you add the second table, the following screen appears



   If you include more than one table in your query, you must join the tables (a column from left table and a column from right table) so that the rows in each table join to create one larger table.

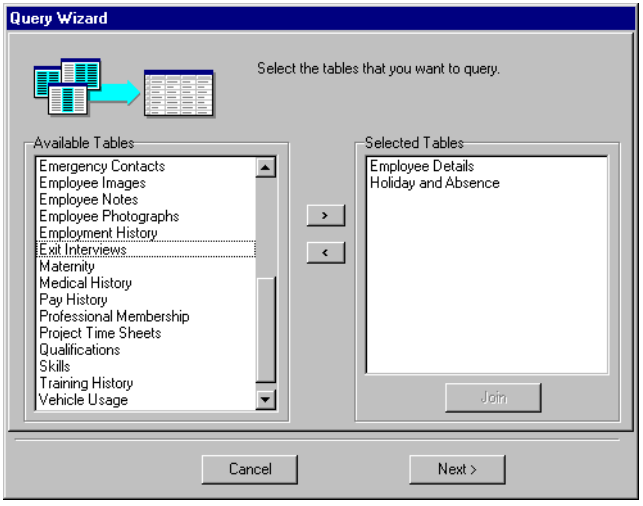
   In this instance, we want to join the Holiday and Absence table (left) to the Employee Details table (right) using the column, Employee Number (a

column common to both tables). For each record in the Holiday and Absence table where there is a matching Employee Number in the Employee Details table, we want access to the data in the associated Employee Details record.

To do this, we want to create a join statement to specify that we want to join data from both tables each time the Employee Number in the Holiday and Absence table matches the Employee Number in the Employee Details table.

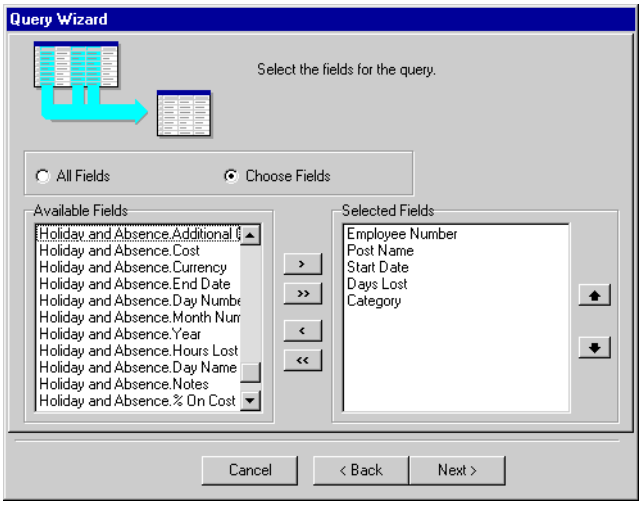
Notice that Personnel Director provides this statement for you in the Joined Fields list.

Click OK. The tables you chose now appear in the Selected Tables list.



5. Now that the tables are selected, click Next.
6. Select the fields to include in your query.

In this example, include the following fields to produce a query that shows **Employee Number**, **Post Name**, **Start Date**, **Days Lost** and **Category**.

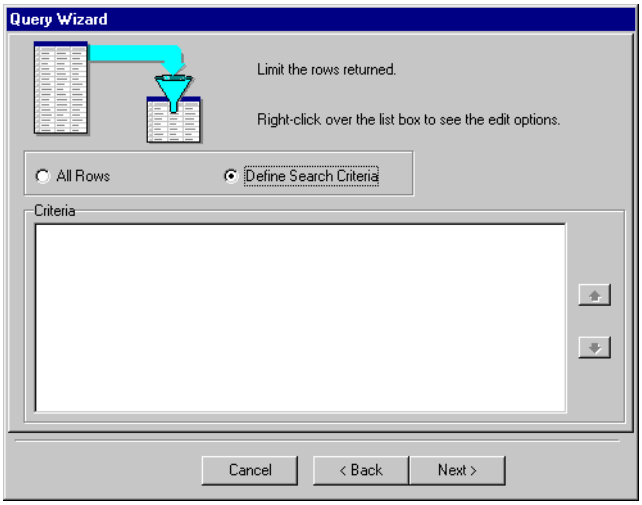


7. Now that the fields are identified, click Next.
8. Indicate whether or not you want to include calculations. In this example, we have no calculations to perform, so click Next.
9. Indicate whether or not you will want to group records. Groups are only used when creating summary queries, so make sure you select No Grouping before clicking Next.
10. Specify whether you want to limit the rows returned.

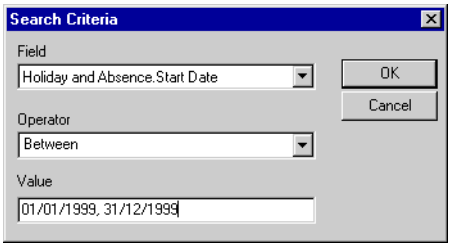
    In this example, we only want to see absences that occurred in the year 1999, so we need to add selection criteria.

Do the following:

- Select the Define Search Criteria option.



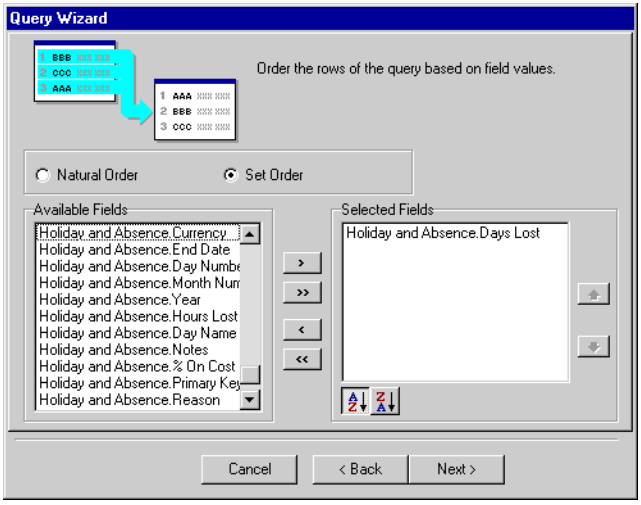
- Right-click the Criteria box and select Insert Criteria from the shortcut menu. Add the criteria where the **Holiday and Absence.Start Date** is between **01/01/1999** and **31/12/1999**. Be sure to put a comma (,) between the two dates.



- Click OK.

11. Now that the search criteria is defined, click Next.
12. Choose the order in which you want to display the results. In this case, we are going to sort the results by Days Lost in descending order.
    - Click the Set Order button. Select **Holiday and Absence.Days Lost** from the Available Fields list and click > to add it to the Selected Fields list.

Use the A to Z sort buttons to sort in ascending order.



13. Click Next. Type **Absences in 2000** in the Description field and select the option to preview the results.
14. Click Finish. The Preview Data screen appears, displaying the results of the query.
15. Click OK. The Query screen appears in the Report Builder screen.

    From here, you can:

    - Save the Query. Click the Close Window button in the upper right corner of the Report Builder screen. Then click Yes to confirm that you want to save the query.
    - Change the query. For further instructions, see "Editing a Query With the Query Designer" on page 377.

Summary Queries

Use summary queries to summarise data contained in employee details.

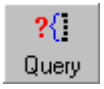
In example 2 of simple queries, we created a query to return all absence for employees in the year 1999. We might not be interested in each individual absence record, but the average or total days lost by an employee. This type of information can be retrieved using a summary query.

Summary queries perform summary calculations on fields (average, sum, maximum, minimum or count) broken down (known as *grouping*) by one or more fields within the table.

Example 3: Summarising Pay History

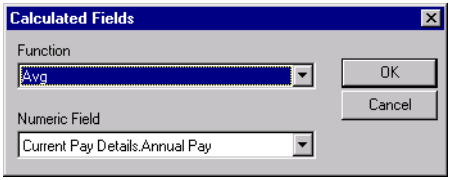
In this example, we create a summary query to return the average annual pay for employees, grouped by department and gender. This query is used to answer questions like "What is the average pay for males and females within the Administration department?".

Here we need information from two tables, the Employee Details (for Department and Gender fields) and the Current Pay Details (for the Current Annual Pay).



1. Click the Query button on the Tools toolbar.
2. Click the New button.
3. Double-click the Query Wizard icon.
4. Select the database tables to include in the query. In this example we need the Employee Details and the Current Pay Details tables. Because we are selecting two tables, we are prompted to join the tables. To join the tables, click OK. Then click Next.
5. We now select the fields that we want to appear in the query. Because we are creating a summary query, we only select fields that are not being summarised. In this example, these are Department and Gender. Click Next to continue.
6. For calculations, we specify which fields we want to summarise. In this example, we want to calculate the Average Annual Pay. To add calculations, click the Add Calculations option.

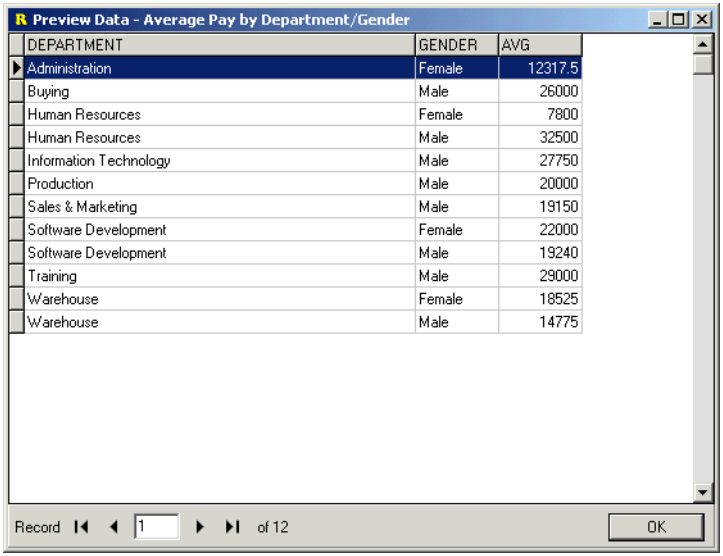
- Select Current Pay Details.Annual Pay from the list of available fields and click the > button.
- On the Calculated Fields screen, select Avg from the Function drop-down list. This will calculate the average annual pay.



- Click OK.
- Click Next to continue.

7. The Grouping screen appears. The Department and Gender fields that we selected in step 5 are automatically added to the list of grouped fields. In a summary query, all fields within the report must either have a summary calculation performed on them or must be used to group the query.
   - Click Next to continue.
8. The Define Search screen appears. We want all absence records to be summarised, so click the Next button.
9. The Set Order screen appears. We want to leave the results in natural order, so select Next.

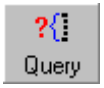
10. Type a description for the query and click the Finish button.



The results display the average (Avg) annual pay by department and gender.

Example 4: Summarising Absence History

In this example, we create a query which summarises the absences taken by employees. We retrieve the average, total, minimum and maximum days lost for each employee as wall as the number of absence records for each employee.

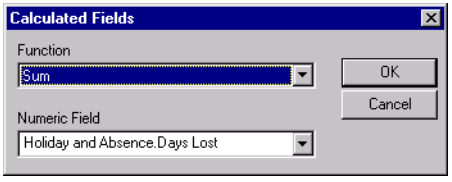


1. Click the Query button on the Tools toolbar.
2. Click the New button.
3. Double-click the Query Wizard icon.
4. Select the database tables to include in the query. In this example we need the Employee Details and the Holiday and Absence tables. Because we are selecting two tables, we are prompted to join the tables. To join the tables, click OK. Then click Next.
5. We now select the fields that we want to appear in the query. Because we are creating a summary query, we only select fields that are not being

summarised. In this example, these are Employee Number and Post Name. Click Next to continue.

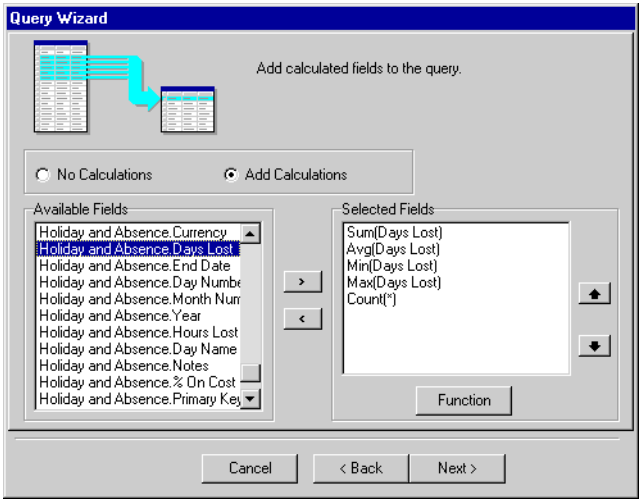
6. For calculations, we specify which fields we want to summarise. In this example, we want to calculate the Average, Sum, Minimum and Maximum days lost for each employee. To add calculations, click the Add Calculations option.

   - Select Holiday and Absence. Days Lost from the list of available fields and click the > button.
   - On the Calculated Fields screen, select Sum from the Function drop-down list. This will calculate the total days lost for each employee.



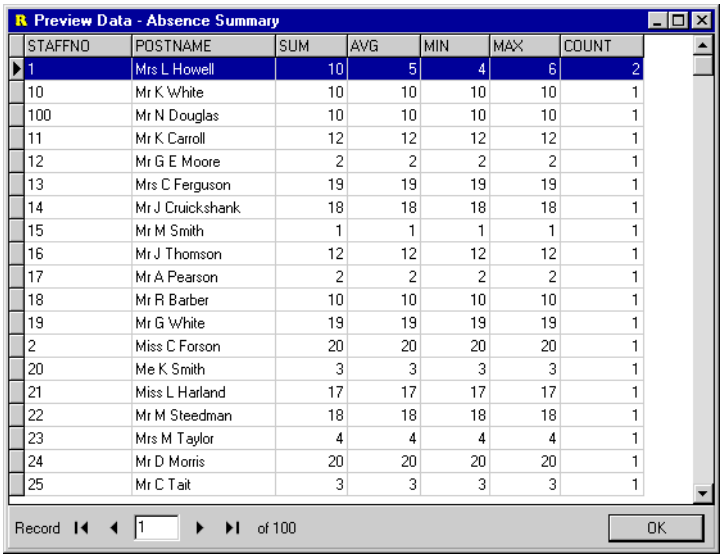
   - Click OK.

   Repeat these three steps adding Average, Minimum, Maximum and Count calculations for Days Lost.



   - Click Next to continue.

7. The Grouping screen appears. The Employee Number and Post Name fields that we selected in step 5 are automatically added to the list of grouped fields. In a summary query, all fields within the report must either have a summary calculation performed on them or must be used to group the query.
   - Click Next to continue.
8. The Define Search screen appears. We want all absence records to be summarised, so click the Next button. (At this stage we could limit the absence records to a particular Category, date range or employees in a specific department.
9. The Set Order screen appears. We want to leave the results in natural order, so select Next.
10. Type a description for the query and click the Finish button.

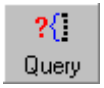


STAFFNO	POSTNAME	SUM	AVG	MIN	MAX	COUNT
1	Mrs L Howell	10	5	4	6	2
10	Mr K White	10	10	10	10	1
100	Mr N Douglas	10	10	10	10	1
11	Mr K Carroll	12	12	12	12	1
12	Mr G E Moore	2	2	2	2	1
13	Mrs C Ferguson	19	19	19	19	1
14	Mr J Cruickshank	18	18	18	18	1
15	Mr M Smith	1	1	1	1	1
16	Mr J Thomson	12	12	12	12	1
17	Mr A Pearson	2	2	2	2	1
18	Mr R Barber	10	10	10	10	1
19	Mr G White	19	19	19	19	1
2	Miss C Forson	20	20	20	20	1
20	Me K Smith	3	3	3	3	1
21	Miss L Harland	17	17	17	17	1
22	Mr M Steedman	18	18	18	18	1
23	Mrs M Taylor	4	4	4	4	1
24	Mr D Morris	20	20	20	20	1
25	Mr C Tait	3	3	3	3	1

The results display the total (sum) days lost, average (Avg) days lost, minimum (Min) and maximum (Max) days lost and the number of absence records for each employee (Count).

Notice that each employee is display only once within the results. The reason is that we grouped our results by Employee Number and Post Name.

Running a Query for Display or Selection

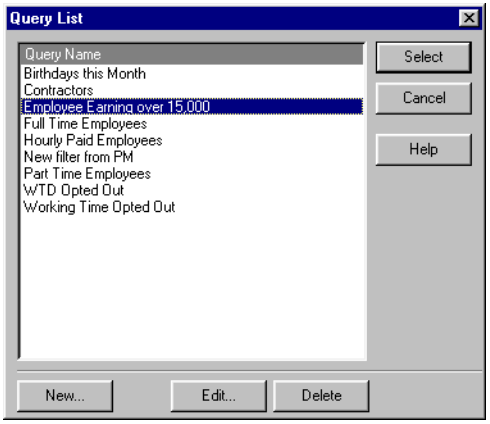


1. Click the Query button on the Tools toolbar

   -or-

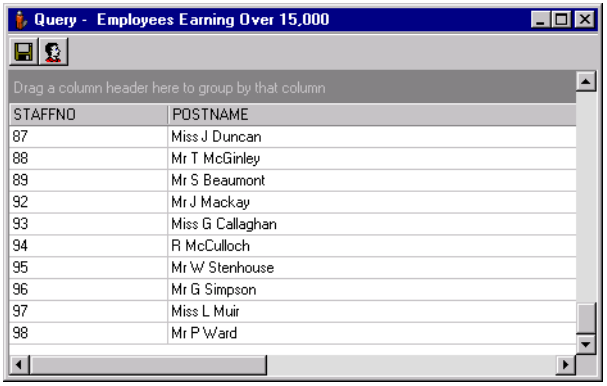
   Select Query Database from the Tools menu.

   The Select Query screen is displayed:



2. Select the query you want to edit and click the Select button.

   The query results are displayed.


Query - Employees Earning Over 15,000
Drag a column header here to group by that column
STAFFNO
POSTNAME
87 Miss J Duncan
88 Mr T McGinley
89 Mr S Beaumont
92 Mr J Mackay
93 Miss G Callaghan
94 R McCulloch
95 Mr W Stenhouse
96 Mr G Simpson
97 Miss L Muir
98 Mr P Ward

3. Do one of the following:

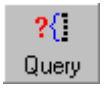
   - To select an employee, double-click the employee's name or select the employee's name and click the Employee button.

- To save the results to a file. Click the Save button, type a filename and choose its location, then click OK. You can save into Text (.TXT}, Hypertext (.HTM) or Excel Spreadsheet (.XLS) format.

Editing a Query With the Query Designer

Essentially you use the same procedure for changing a query for display purposes or a query to be used in a report.

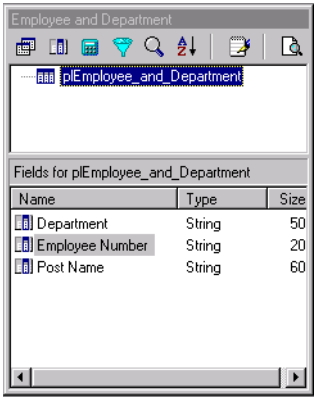
1. Do one of the following:



- If you are updating a query used for display purposes, click the Query button on the Tools toolbar, select the query you want to update, and click the Edit button.

- If you are updating a query to be used in a report, click the Report button on the Tools toolbar, select the report you want to update, and select Open from the File menu. Then click the Data tab.

The query definition is displayed.



You can change any of the elements of the query. For example, to edit the Example 2 query to change the pay amount, you would click the Search button and change the Pay History.Pay selection criteria. For more information, see “Changing Selection Criteria” on page 384.

Use the following buttons to edit your query.

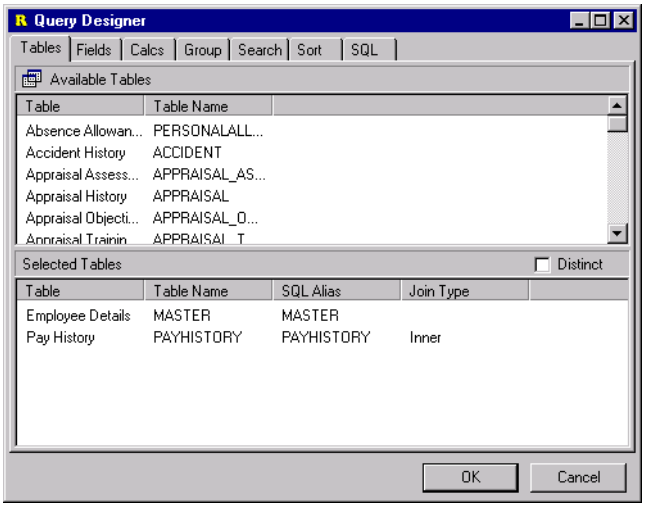
To	Click	For more information
Add, change or remove tables		"Changing Tables" on page 379
Add or remove fields		"Changing Selected Fields" on page 381
Add, change or remove calculations		"Changing Calculations" on page 382
Add or remove groupings		"Changing Groupings" on page 383
Add, change or remove selection criteria		"Changing Selection Criteria" on page 384
Add, change or remove sort order		"Changing Sort Order" on page 385
Change SQL statements		"Changing SQL Statements" on page 386
Preview the results		

2. When you finish updating the query, do one of the following:
   - If you are updating a query used for display purposes, close the Report Builder screen, then click Yes to confirm that you want to save the changes.
   - If you are updating a query used in a report, click the Design tab. From here you can change the layout of the report or select Save from the File menu.

Changing Tables

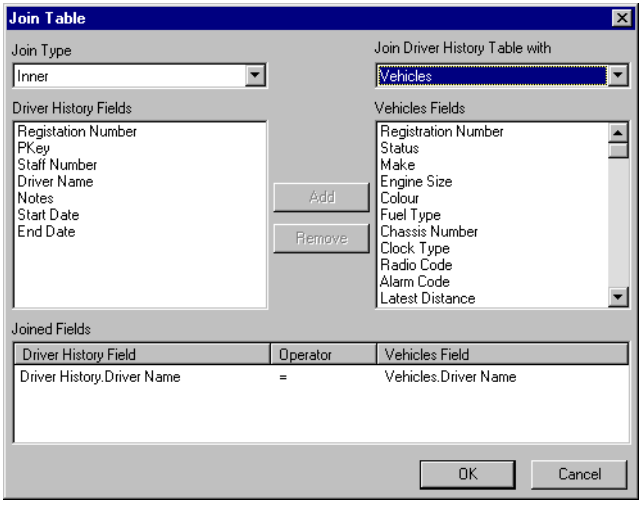
1. Click the Tables button on the query screen.

   The Tables tab appears.



2. To add a new table, double-click the name of the table you want to add.

   The Join Table screen appears.



If you include more than one table in your query, you must join the tables (for example, a column from left table and a column from the right table)

so that the rows in each table are joined to create one larger table. Usually this column is the same in the right table as in the left table, such as Employee Number.

All rows from the left table and all rows from the right table are included if values meet the retrieval criteria. If values do not meet the retrieval criteria, their rows are omitted.

To specify the joined field, simply select a field in the left table, select the associated field in the right table, then click the Add button.

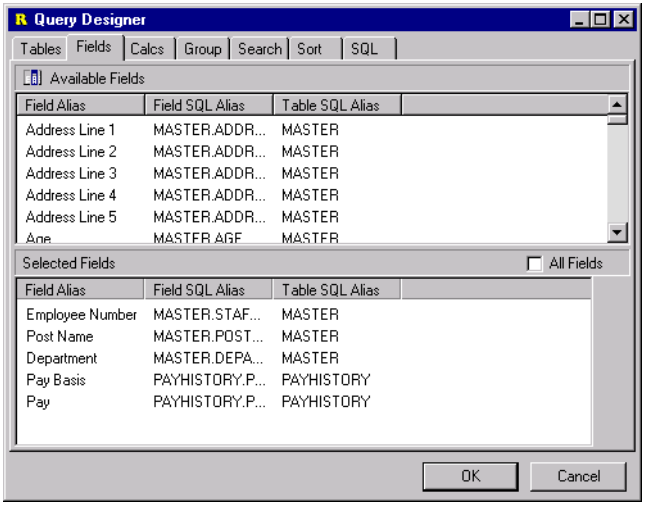
The result appears in the Joined Fields list where you can change the Operator if necessary. (To remove a statement from this list, simply select the statement and click the Remove button.)

3. To change a table statement, click the ... button. The Table Join screen appears. Add, change or remove the statements as required.
4. To remove a table statement, double-click the Field Alias name.

Changing Selected Fields

1. Click the Fields button on the query screen.

   The Fields tab appears.

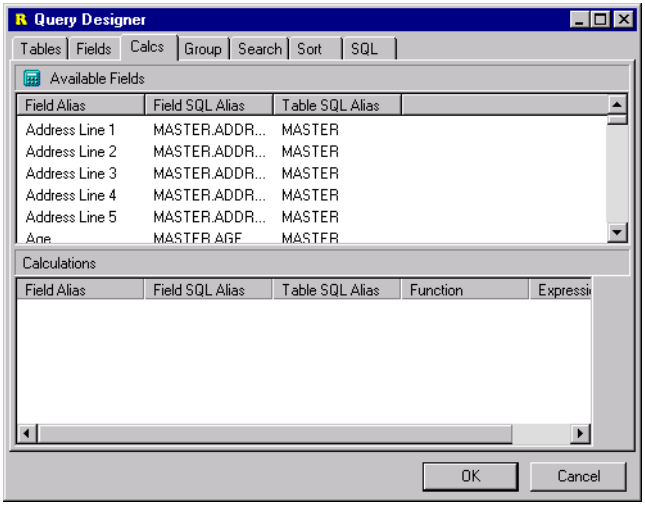


2. To add a field statement, double-click the name of the field in the Available Fields list.
3. To remove a field statement, double-click the Field Alias name in the Selected Fields list.

Changing Calculations

1. Click the Calcs button on the query screen.

   The Calcs tab appears.

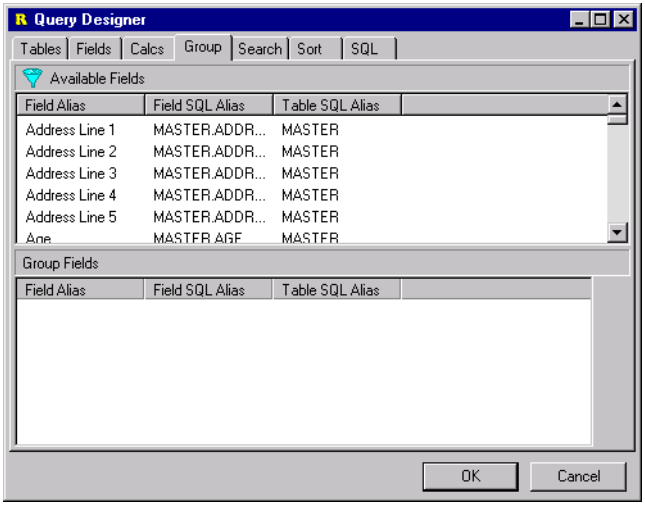


2. To add a calculation statement, do the following:
   - Double-click the name of the field to be used in the calculation. The field appears in the Calculations list.
   - Click the Function cell in the row of the field, and select the function you want from the drop-down list.
3. To change a calculation statement, click the Function cell in the row of the field, and choose the desired function from the drop-down list.
4. To delete a calculation statement, double-click the Field Alias name in the Calculations list.

Changing Groupings

1. Click the Group button on the query screen.

   The Group tab appears.

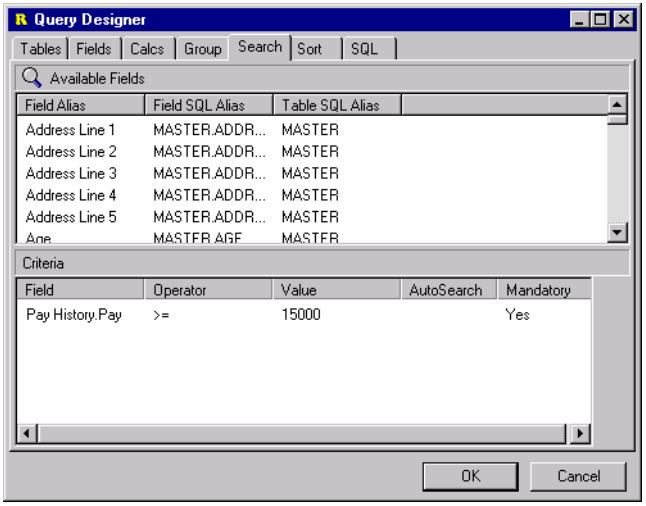


2. To add a grouping statement, double-click the name of the field to be used for grouping in the Available Fields list. The field appears in the Group Fields list.
3. To delete a grouping statement, double-click the Field Alias name in the Group Fields list.

Changing Selection Criteria

1. Click the Search button on the query screen.

   The Search tab appears.

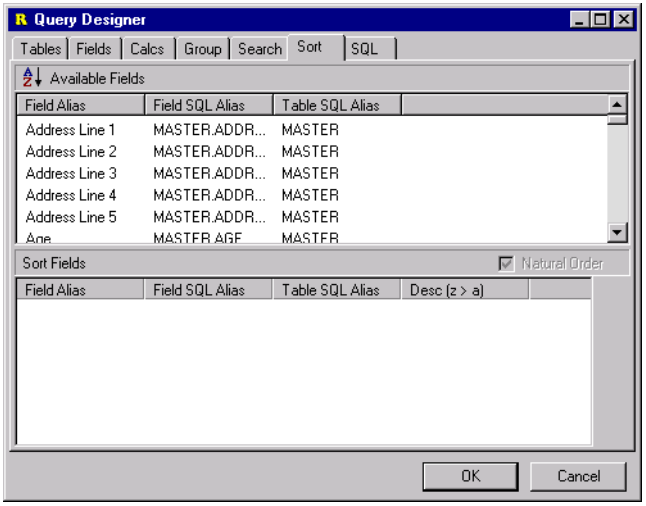


2. To add a search statement, do the following:
   - Double-click the name of the field to be searched. The field appears in the Criteria Fields list.
   - Click the Operator cell in the row of the field, and select the operator you want from the drop-down list.
   - Click the Value cell in the row of the field, and type the value to be searched for.
3. To delete a search statement, right-click the statement and select Remove from the shortcut menu.

Changing Sort Order

1. Click the Sort button on the query screen.

   The Sort tab appears.

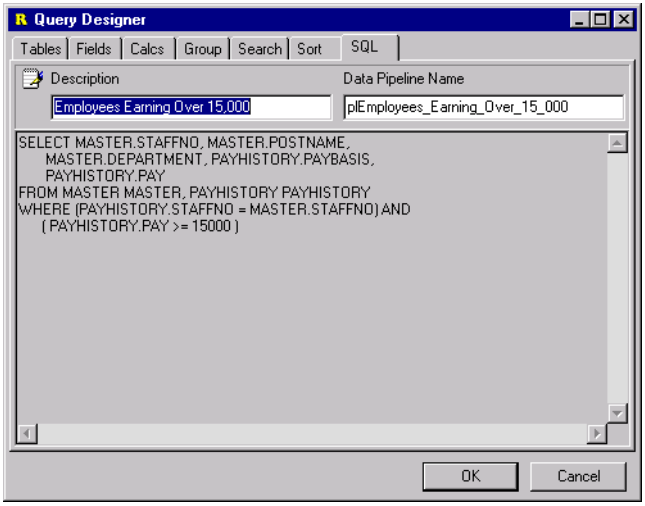


2. To add a Sort statement, do the following:
   - Double-click the name of the field to be sorted. The field appears in the Sort Fields list.
   - Click the Desc checkbox in the row if you want the field to be sorted in descending order (Z to A or 9 to 0). Clearing the checkbox indicates the field is to be sorted in ascending order.
3. To change the sort order, clear or mark the Desc checkbox.
4. To delete a Sort statement, double-click the Field Alias name in the Sort Fields list.

Changing SQL Statements

1. Click the SQL button on the query screen.

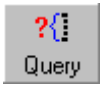
   The SQL tab appears.



2. Add or change the SQL statements as required.

Deleting a Query for Display or Selection

To delete a database query:



1. Click the Query button on the Tools toolbar

   -or-

   Select Query Database from the Tools menu.

   The Select Query screen is displayed:

2. Select the query you want to delete and click the Delete button.

17 WORKING WITH REPORTS

Overview

Personnel Director comes with its own integrated Report Builder, so you can select and modify many pre-defined reports. Use a combination of the Query and Report Wizard to quickly create a new report to meet your own specifications, then save the results as a report template.

Displaying Reports

1. To display existing reports, do one of the following.

   - On the Tools toolbar, click the Reports button.

     – or –

   - Select Reports from the Tools menu.

   The Personnel Director Report List screen appears. For instructions on how to use Report List, see chapter 13 “Working with Personnel Director Report List” on page 297.

2. Select the report you want to view.

3. Click the Preview button, or select Preview from the File menu.

   The Print Preview screen appears.

4. Use the buttons as follows:.

	Print the screen.
	Size the page so that it fits in the Preview window.
	Size the page to fit the width of the Preview window.
	Size the page to display 100% of its actual size.

	Display the first page.
	Display the previous page.
	Display the next page.
	Display the last page.
	Set the zoom magnification
	Close the Preview window.

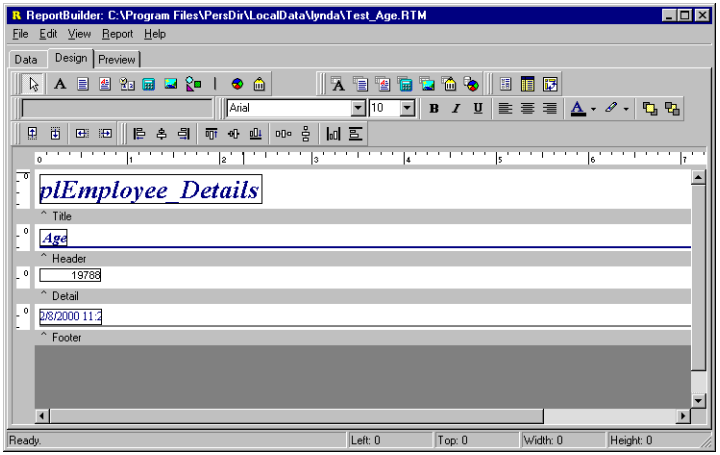
Changing a Report

If you want to change the content or the appearance of an existing report, you open it in the Report Builder.

1. Click the Reports button on the toolbar, or select Reports from the Tools menu.
2. Select the report you want to change.

3. Click the Open button or select Open from the File menu.

   The Report Builder screen appears.



4. Do one of the following:
   - To update the query, click the Data tab. For more information, see "Editing a Query With the Query Designer" on page 377.
   - To update the format, click the Design tab. For more information, see "Using Page Layout Tools in the Page Designer" on page 408.
   - To view or print the result, click the Preview tab. For more information, see "Displaying Reports" on page 387.

Deleting a Report

When a report is no longer required, you can delete it.

1. Click the Reports button on the toolbar or select Reports from the Tools menu.

2. Click the report you want to delete, then click the Delete button.
3. Select Yes to confirm the deletion.

Creating New Reports

If you do not see a report that matches your requirements in the list of standard reports, you can create your own. There are two steps in creating a new report:

- Create a query to extract the desired data for your report. Use the step-by-step assistance of the Query Wizard or design your own query.
- Build the report using step-by-step assistance from the Report Wizard, or design your own report.

There are three stages to using Report Builder.

Data tab. Use the Data tab to add or change the data contained in a report.

Design tab. Use the Design tab to create or change the report layout.

Preview tab. View the results on the Preview tab.

Note: *You will not see the Preview tab if you are not authorized to view employees. For information on how to reset employee authorisation, see chapter 3 "Setting Up Security" on page 35.*

Creating New Reports Using the Report Wizard

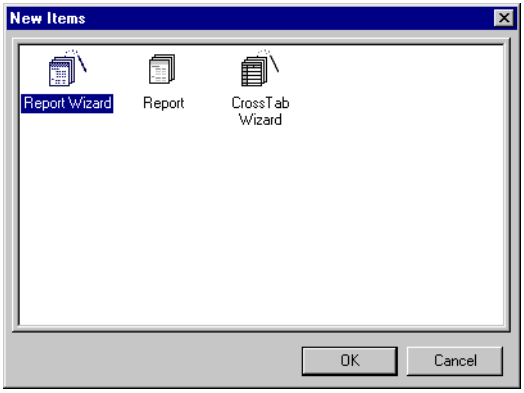
You can use the Report Wizard to add some of the data to reports, and then use the Report Designer for further specifications. This section contains five examples of creating these types of reports.

Example 1 - A Simple Report (Employee List)

This example shows how to create a report of all employees that lists their employee number, name and department.

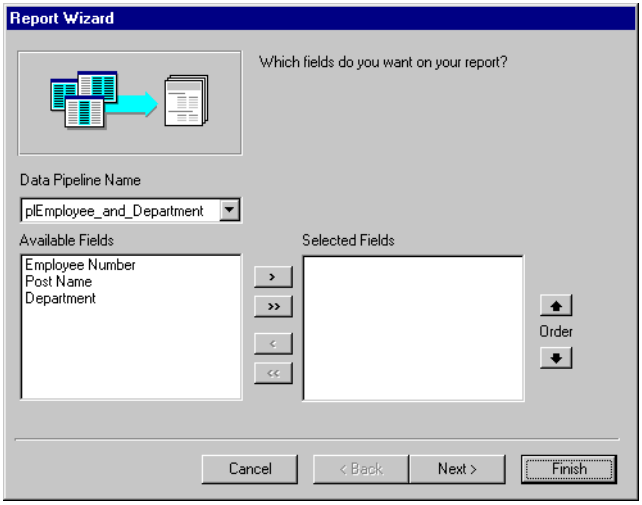
1. Click the Reports button on the toolbar.
2. Click the New Report button.
3. Complete the remaining steps, beginning with step 3, in "Example 1: A Query with One Table and No Selection Criteria" on page 359.
4. When the query is complete, click the Design tab in the Report Builder window.

5. From the File menu, select New.



6. In the New Items window, double-click the Report Wizard.

   The Report Wizard appears.



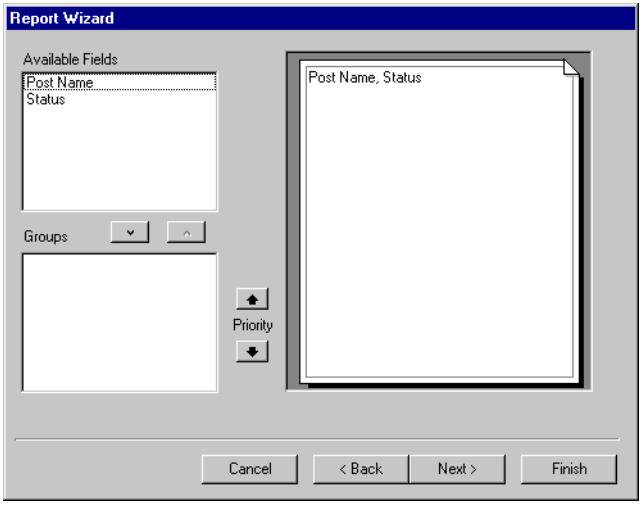
   Use this screen to specify the type of data to include in the report. In this report, we are interested in employee numbers, names and departments. All this data is contained in the data pipeline plEmployee_Name_and_Department.

7. To select the fields for the report, click the button with the >> symbol to add all of the fields.

If you need to change the sort order, you can do so by selecting fields on the right, then clicking the direction arrow buttons.

8. Click the Next button.

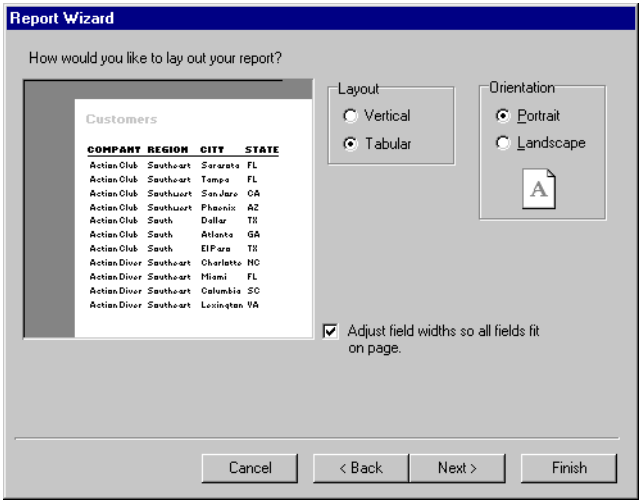
   The second screen of the Report Wizard is displayed.



   Use this screen to indicate whether you want a detailed or summary report grouped by certain fields. If you are grouping, you can also set the priority for each group. For example, if you had an additional Status field, you could group first by department, then by status. The next example demonstrates this feature.

9. As this report is to show detail not summary groups, simply click the Next button.

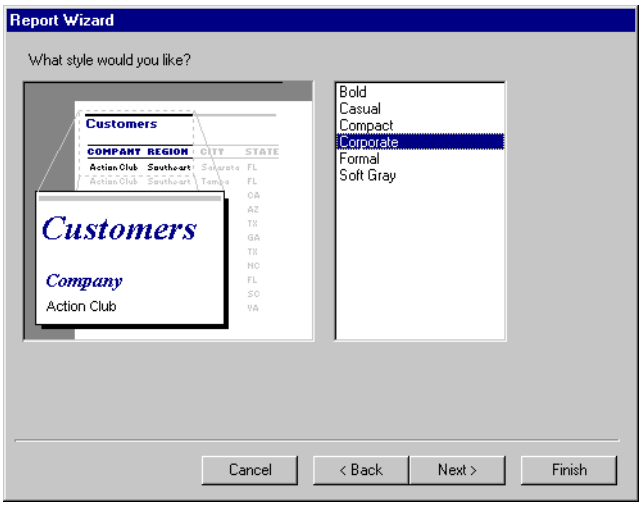
The third screen of the Report Wizard is displayed.



Use this screen to indicate the page layout and orientation: a vertical (stepped) or tabular layout, portrait (vertical) or landscape (horizontal) page orientation, and adjust the field widths to fit the page.

10. As this report is to be printed vertically in tabular format, click the Next button.

    The fourth screen of the Report Wizard appears.



Use this screen to indicate the report style. Click each style to see how it looks.

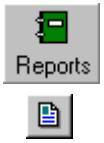
11. As the Corporate style is fine for this report, click the Next button.

    The final screen of the Report Wizard is displayed.

Report Wizard
That is all the information needed to create your report
Do you want to preview the report of modify the report's design?
Preview the report
Modify the report's design
Cancel
< Back
Next >
Finish

12. You have a choice of previewing the report or modifying the design. To go directly to the Preview, click the Finish button.
13. To save and name the report, select Save from the File menu. Enter the report name **Employee List** and click the Save button.

Example 2 - A Grouped Report (Employees Grouped by Department)

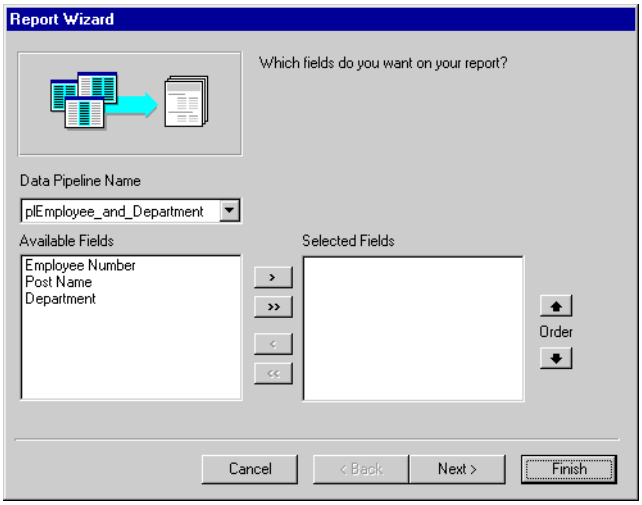


This example shows how to create reports that use groups. Employees are to be listed within their departments sorted by employee number.

1. Click the Reports button on the toolbar.
2. Click the New Report button.
3. Complete the remaining steps, beginning with step 3, in "Example 1: A Query with One Table and No Selection Criteria" on page 359.
4. When the query is complete, click the Design tab in the Report Builder window.
5. From the File menu, select New.

6. In the New Items window, double-click the Report Wizard.

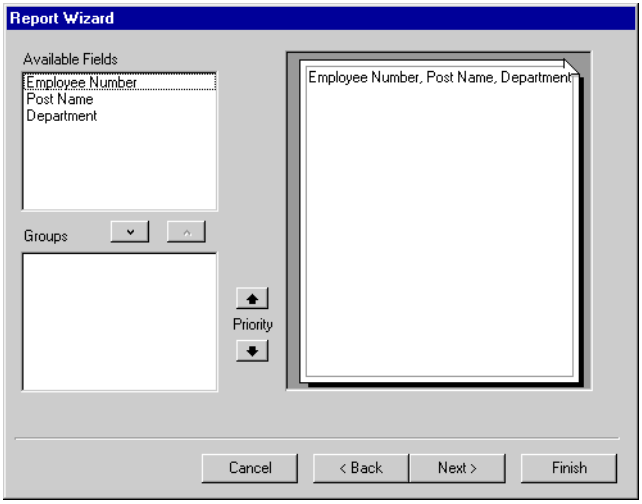
   The Report Wizard screen appears.



7. Select data the report is to contain.

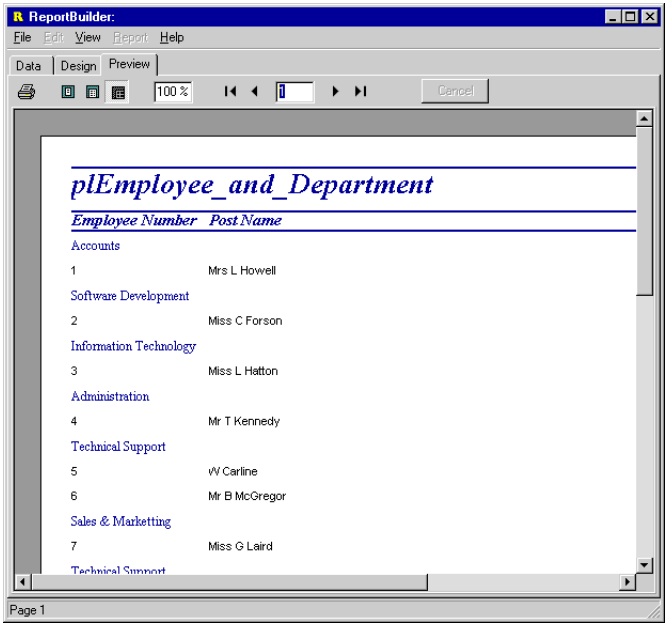
   - Click the >> button. This adds all the fields on the left to the Selected Fields list on the right.
   - Rearrange the fields, so that the order is: Employee Number, Post Name and Department.

8. Click the Next button.



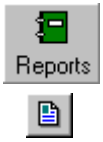
9. To group employees by department, do the following:
   - From the Available Fields list in the top left, click Department.
   - Click the V arrow. Department appears in the Groups list and you can preview the layout on the left.
10. Click the Next button and accept the options already selected on the next three screens.
11. Click Next and accept all of the options already selected until you display the last screen of the wizard.

12. Click the Finish button to complete and display your report.



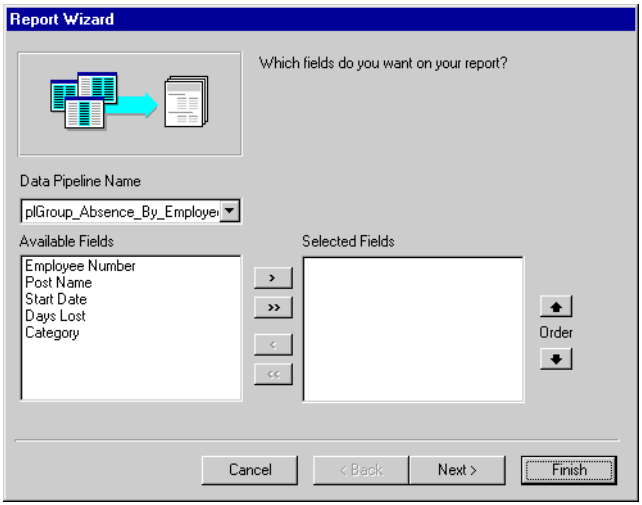
Example 3 - A Grouped Report (Absence Details Grouped by Employee)

In this example, we create a report that groups absence records by employee and display the total days lost for employee using a summary calculation. This report is based on “Example 2: A Query with Two Tables and Selection Criteria” on page 365.



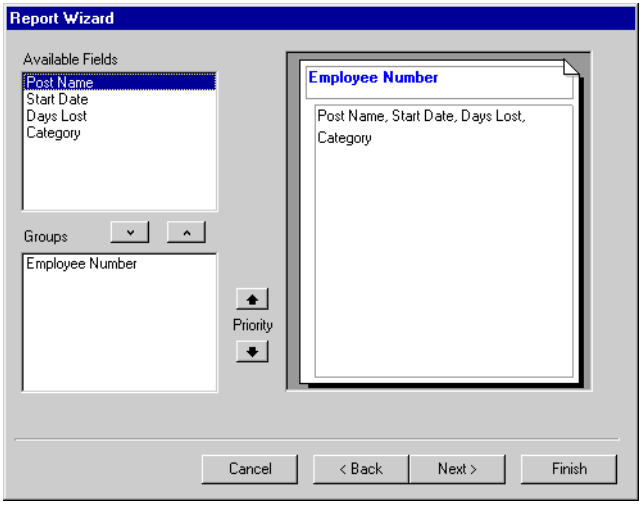
1. Click the Reports button on the toolbar.
2. Click the New Report button.
3. Complete the remaining steps, beginning with step 3, in “Example 2: A Query with Two Tables and Selection Criteria” on page 365. Instead of sorting the query on Days Lost, sort the query on the Employee Number field.

4. When the query is complete, click the Design tab in the Report Builder window.
5. From the File menu, select New.
6. In the New Items screen, double-click the Report Wizard.



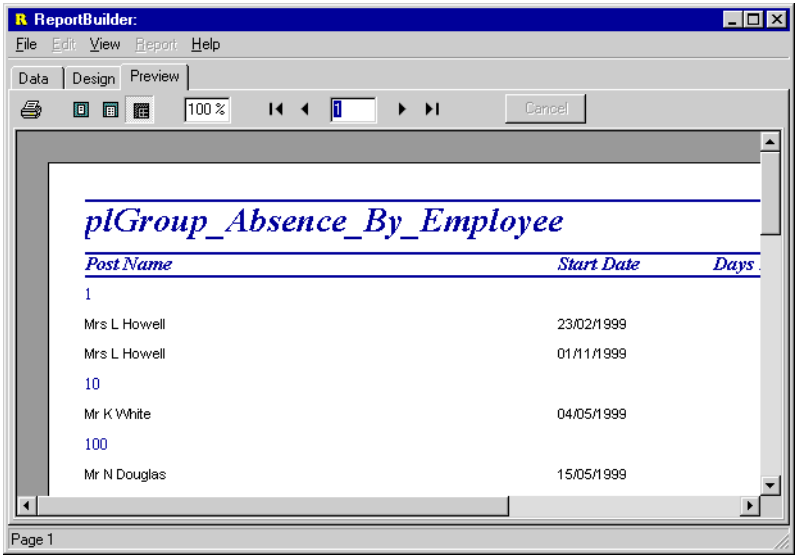
- Click the >> button. This adds all the fields on the left to the Selected Fields list on the right.
- Rearrange the fields so that the order is: Employee Number, Post Name, Start Date, Days Lost and Category.
- Click Next.

7. The Grouping screen appears. We want to group absences by Employee Number. Add the Employee Number field to the list of Groups.



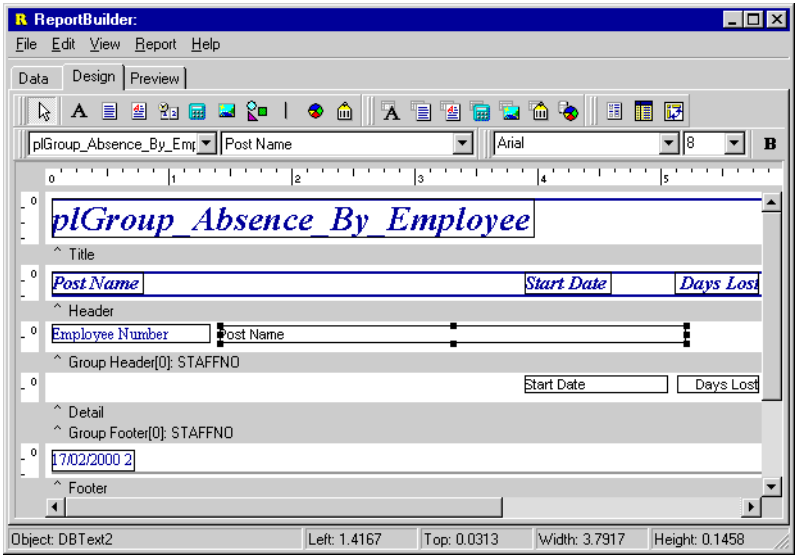
- Click Next.

8. Click Next until the final wizard screen is displayed. Click Finish to preview the report.

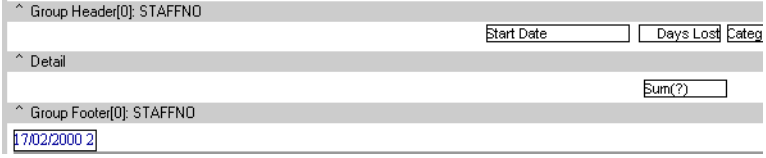


9. Click the Design tab to adjust the report layout.

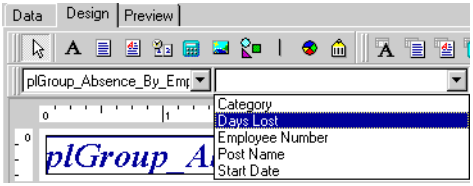
- Move the Post Name to the Group Header next to the Employee Number field. Drag the Post Name into the position shown below.



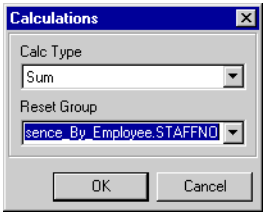
10. We now want to add a summary calculation field to display the total days lost for each employee.
    - Drag the group footer for the STAFFNO field so that there is space to place a summary field.
    - Click the DBCalc button.
    - In the group footer for the STAFFNO, click the location directly under the Days Lost field in the detail band.



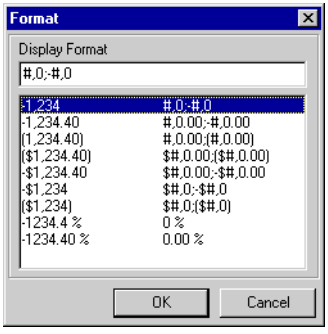
- With the DBCalc field selected, select Days Lost from the Data drop-down list.



- With the DBCalc field selected, right-click and select Calculations from the menu.



- Then select Sum from the Calc Type drop-down and click OK.
- Right-click the DBCalc field and select Display Format from the menu. Set the display to one decimal place and click OK.

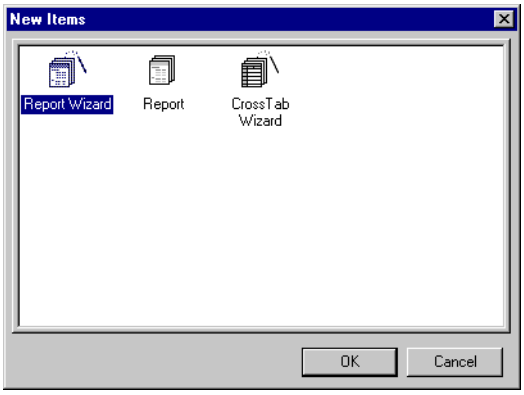


11. Click the Preview tab to view the finished report.

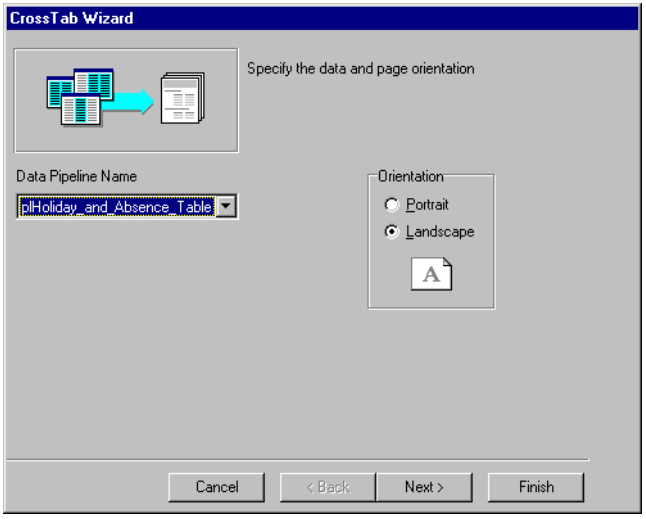
Example 4 - Creating a Quick Crosstab Report

Cross tab reports are useful when you need to analyse information by several different fields; for example average days lost by department, gender and absence category.

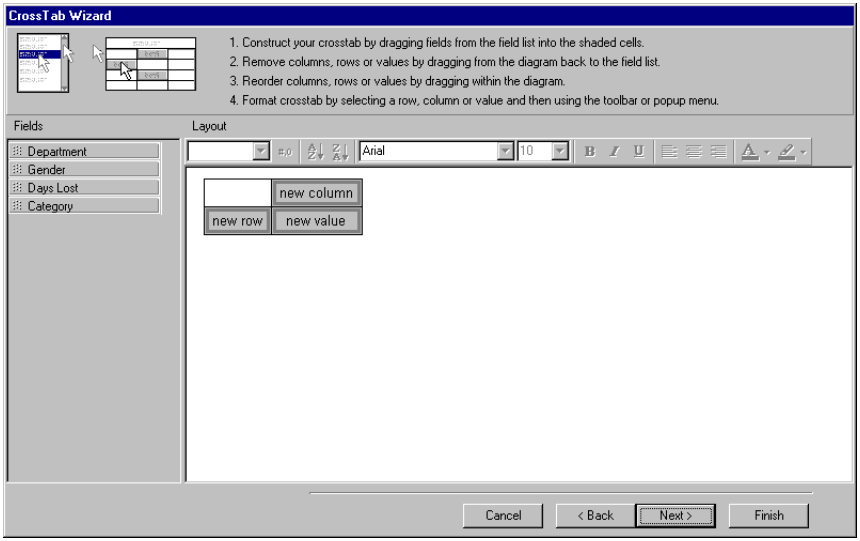
1. Create a new query using the Employee Details and Holiday and Absence tables. Select the following fields: Department, Gender, Days Lost and Category. Do not group fields or add calculations.
2. Click the Design tab, then select New from the File menu.



3. Double-click the Cross Tab icon.



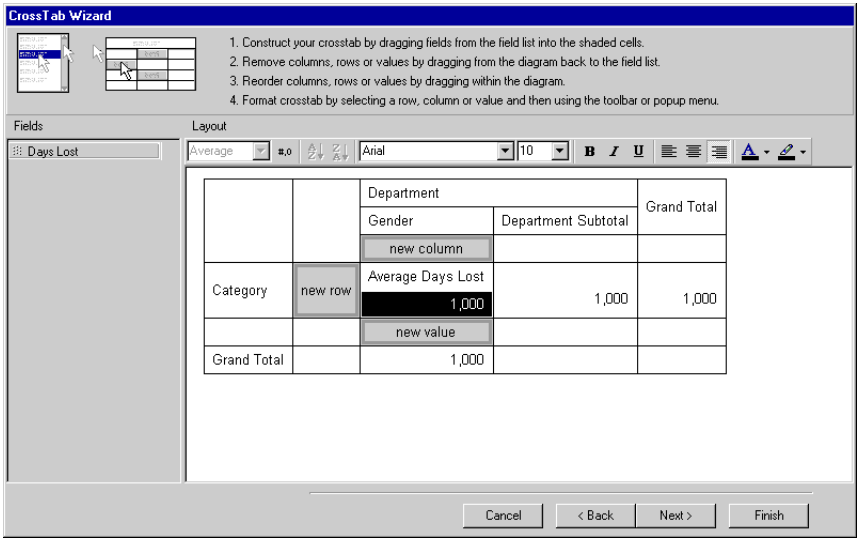
4. As we want the report orientation to be in portrait mode, click Next.


CrossTab Wizard
1. Construct your crosstab by dragging fields from the field list into the shaded cells.
2. Remove columns, rows or values by dragging from the diagram back to the field list.
3. Reorder columns, rows or values by dragging within the diagram.
4. Format crosstab by selecting a row, column or value and then using the toolbar or popup menu.
Fields
Layout
Department
Gender
Days Lost
Category
Arial
10
new column
new row
new value
Cancel
< Back
Next >
Finish

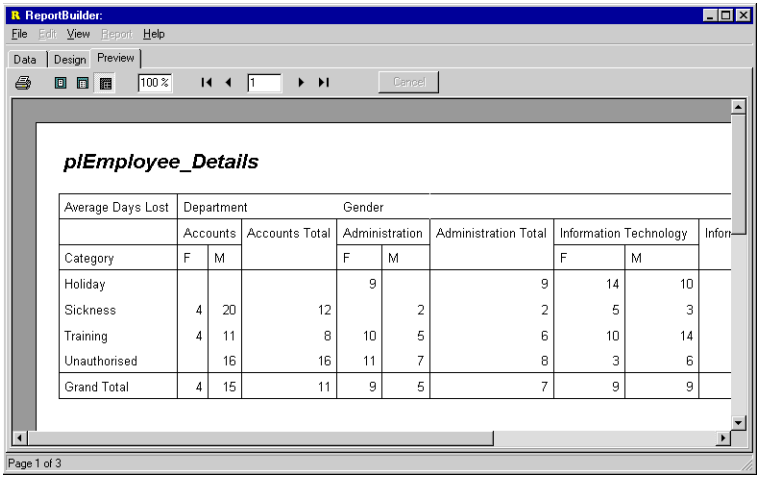
Decide what fields you want in the columns and rows, as in a spreadsheet.

- Department is to appear as a column. Drag the Department field from the left column over the New Column box.
- Department days lost figures are to be divided by Gender. Drag the Gender field from the left column to the New Column box under Department.
- Categories are to appear as rows. Drag the Categories field over the New Row box.
- Days Lost are to be the values that appear in the table. Drag the Days Lost field from the left column to the New Value box.
- Days Lost are to appear as averages. Select Sum of Days lost in the table, then select Average from the Calculation drop-down list on the Cross Tab Wizard toolbar.
- Set the 1000.00 figure under the Average Days Lost to two decimal places. Right-click the figure, and select Display Format from the drop-down menu. Set the display format to two decimal places.

The Cross Tab Wizard automatically generates the layout for the totals.



5. Click the Finish button.
6. To view the table, click the Preview button.

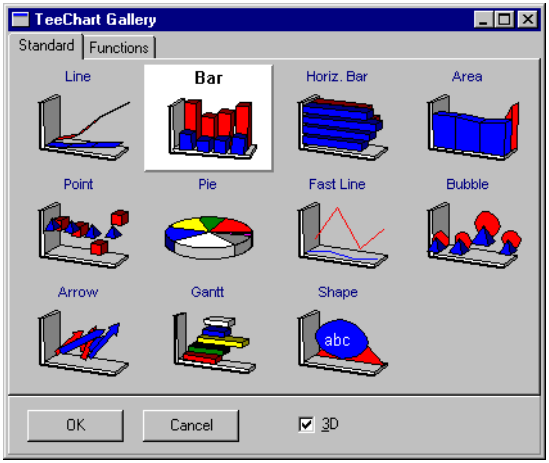


Average Days Lost	Department			Gender				
	Accounts		Accounts Total	Administration		Administration Total	Information Technology	
Category	F	M		F	M		F	M
Holiday				9		9	14	10
Sickness	4	20	12		2	2	5	3
Training	4	11	8	10	5	6	10	14
Unauthorised		16	16	11	7	8	3	6
Grand Total	4	15	11	9	5	7	9	9

Example 5 - Creating a Graphical Report

You can use Report Builder to create graphs using its charting component. You must use a summary query to generate graphs (see the examples in "Summary Queries" on page 371). In this example, we want a graph of average salary by department.

1. Create a new query using the Employee Details and Current Pay Details tables. Select the Department field. Add a calculation to average Annual Pay.
2. Click the Design tab.
3. Add the graph component of your report.
   - Make room for the chart by enlarging the window and dragging down the Report Footer bar.
   - Click the DBChart button. Then click your mouse where you want it located in the Report Footer section.
   - Drag the handles of the chart to make it as large as you want.
4. Define the characteristics of the graph.
   - Right-click the chart and select Edit Graph from the drop-down menu.
   - On the Chart - Series tab, click the Add button, select the Bar style chart and click OK.

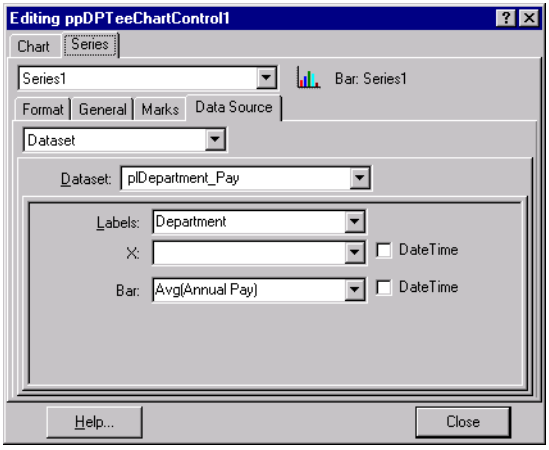


- Click the Series - Data Source tab.
- Select Dataset from the drop-down list.
- On the DataSource tab, provide the following information:

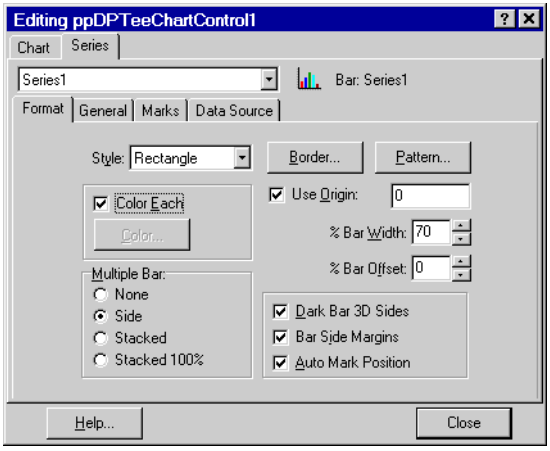
  Dataset. Select the name of the query you just created from the Dataset drop-down list.

  Labels. Select Department from the drop-down list.

  Bar. Select Avg(Annual Pay) from the drop-down list.



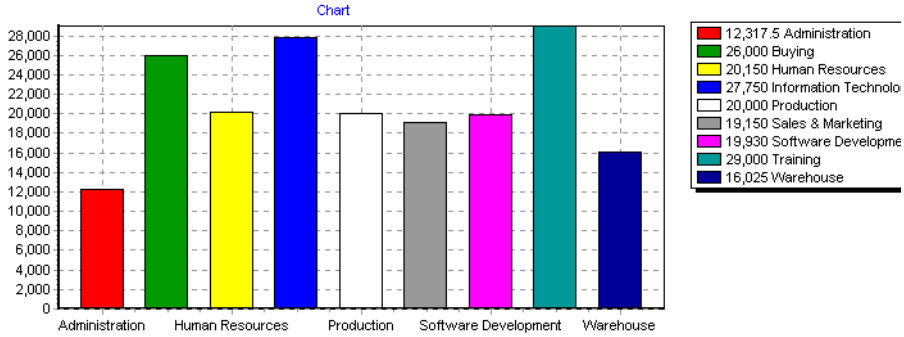
- Select the desired colours for the bars in the chart, click the Series-Format tab.



Click the Color Each checkbox.

- When you are finished, click the Close button.

5. Click the Preview button.



There are many techniques you can use to improve the appearance of the chart. For more information, see “Changing Chart Properties” on page 350.

Using the Page Designer

Personnel Director has a Page Designer that you use to edit report layouts or create new ones.

In addition to creating layouts for reports, you can use the Page Designer to:

- Set units of measurement and display options.
- Control print settings for reports: select summary or detail view, landscape or portrait page orientation, and start a new page when the content of a group field changes.

Before you can use the Page Designer to modify the layout of a new report, you need to:

- Query the database to select the information you want to use for the report, as described in chapter 16 “Creating Queries” on page 357, and
- Create the report as described in “Creating New Reports” on page 390.

Using Page Layout Tools in the Page Designer

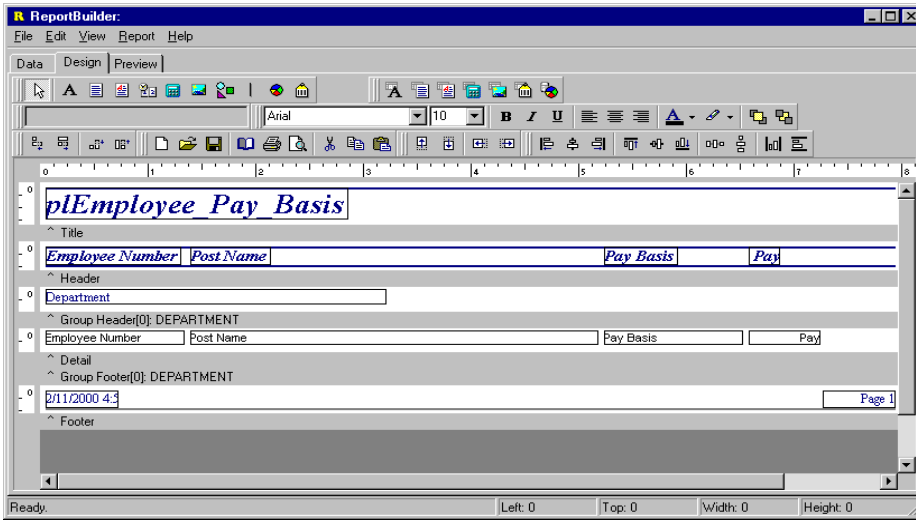
The Page Designer is used to design or modify report layouts. If you want to use the report templates provided with Personnel Director, you do not have to use the Page Designer. However, if you want to change the layout of a report or create a new layout, you must use the Page Designer.

The Page Designer is displayed by:

- clicking the Open Object button on the Report List toolbar.
- selecting File>Open in the Report List.

The Design Screen

The Design screen displays either a blank page or the layout of the report you selected to modify.



If you are designing or modifying a simple report, the screen will have four sections:

- Title
- Header
- Detail
- Footer

Grouped reports will have additional Group Header and Group Footer sections.

On this screen you build your report layout by placing and arranging objects with the Page Designer using the tools on the following toolbars:

- Standard Components
- Data Components
- Advanced Components
- Report Tree
- Data Tree
- Standard
- Format
- Edit
- Draw
- Align or Space
- Size
- Nudge

To activate a toolbar:

- Select View>Toolbars, then select or deselect the active toolbars from the popup menu. A checkmark means that the toolbar is active. Each of these toolbars is described on the following pages.

Placing Labels, Shapes and Images

To place an object or data field use the Standard, Data or Advanced Components toolbar. Following are a list of the functions:

1. Click the appropriate toolbar button, as shown below.

	Select Object	Select a placed object
	Label	Place a text label
	Memo	Place a memo
	Rich Text	Place a formatted text label
	System Variable	Place a system variable such as date or page count

	Variable	Place any variable such as a string or integer
	Image	Place a BMP of your organisation logo. Right-click and select Picture to place another image.
	Shape	Place a geometric shape
	Line	Place a line
	Graph	Place a graph with data you supply
	Bar Code	Place a bar code graphic
	Text Field	Place a text field from the database
	Memo Field	Place a memo field from the database
	Photograph	Place an employee photograph from the database
	Bar Code Field	Place a bar code field from the database
	Variable	Place any variable using fields from the database
	Graph	Place a graph with data from the database
	Region	Place a region
	SubReport	Place a subreport
	CrossTab	Place a cross table.

Point to the location where the object is to be placed and press the left mouse button.

- For a Data Field, select the name of the field from the drop-down list. For example, to insert employee number description, select Employee Number from the drop-down list. If the drop-down list is not displayed, select View>Toolbars and select Edit from the list of toolbars.
- For a Label field, type the text you want to appear.

Positioning and Sizing Objects and Data Fields

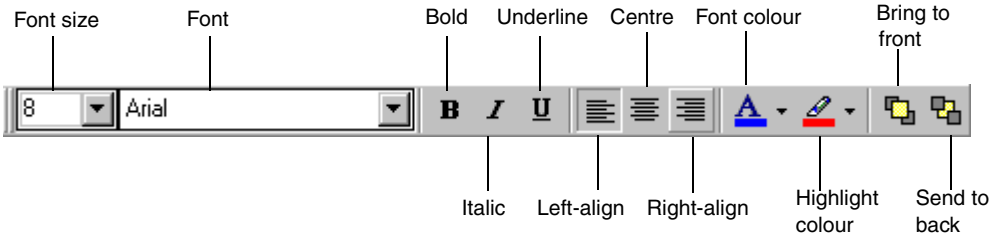
Take the following actions to position and size objects:

- To position the object or field, drag it to the desired location.
  - To view the exact position of an object, right click and select Position.
  - To bring objects to the front of the layout, click the Bring to Front button or right click and select Bring to Front.
  - To send objects to the back of the layout, click the Bring to Front button or right click and select Send to Back.
- To size the object:
  - Use the sizing handles that appear when you move the mouse to the bounding box, or right-click and select AutoSize to size the field to the correct size.

  Tip: *You can also do some extremely fine positioning with the Nudge toolbar, as described on "Fine Tuning the Size and Position of Objects" on page 413.*

Formatting Text Objects

You can use the Format toolbar to change any of the following text properties:

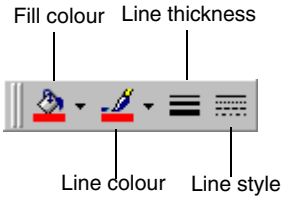


You can also edit other text properties by selecting from the popup menu.

1. Select an object, then right-click to display the popup menu.
2. Change properties such as wordwrap, transparency or visibility of objects.

Formatting Graphic Objects

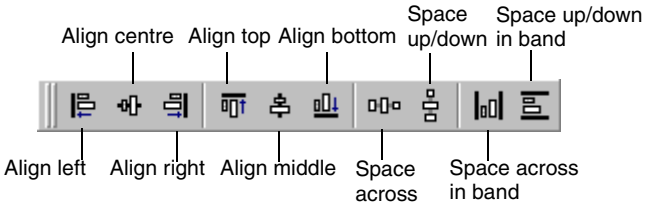
- You can use the Draw toolbar to add lines and graphic shapes and add colour fills to them.



You can also quickly change a line from single to double or vice versa by right-clicking a line and selecting Single or Double from the shortcut menu.

Aligning and Spacing Objects

The Page Designer has its own toolbar that you can use to align and space objects. You can also set the grid to a specified number of millimeters and set objects to snap to the grid. This gives you extremely powerful features to align all objects horizontally or vertically as you work.



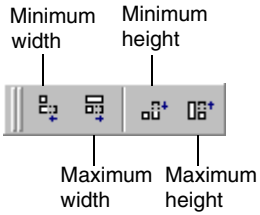
Using a Layout Grid

1. From the Design page, select Grid Options from the View menu.
2. Set the size of the grid in millimeters along the horizontal and vertical (X and Y) axes.
3. To have objects snap to the grid, click the Snap to Grid checkbox.
4. Click OK.

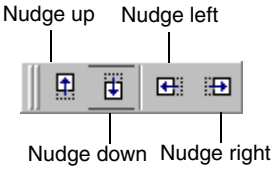
Fine Tuning the Size and Position of Objects

There are two toolbars you can use to control the size of objects and fine tune their positioning: the Size and Nudge toolbars.

Use the Size toolbar to instantly maximise or minimise the width or height of selected objects.



Use the Nudge toolbar to move selected objects up or down, left or right, a millimeter at a time.

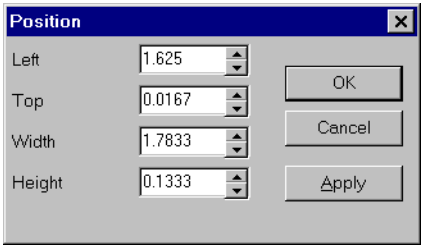


Setting the Exact Print Position for a Label or Field

You can set the exact print position for items in the page design.

To set the exact print position:

1. Select the label or field.
2. Right-click and select Position from the shortcut menu.



3. Type the exact measurement for the item from the left or top of the page or the width or height of the item.
4. Click OK.

Changing the Unit of Measure

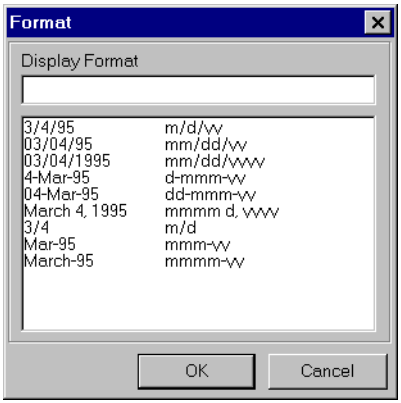
You can change the unit of measure used for the ruler and for setting measurements and print position.

1. From the Report menu, select Units.
2. Select the unit of measurement you want to use.

Changing the Display Format for Date Fields

You can change the display format of date fields.

1. Select a date field, then right-click and select Display Format.

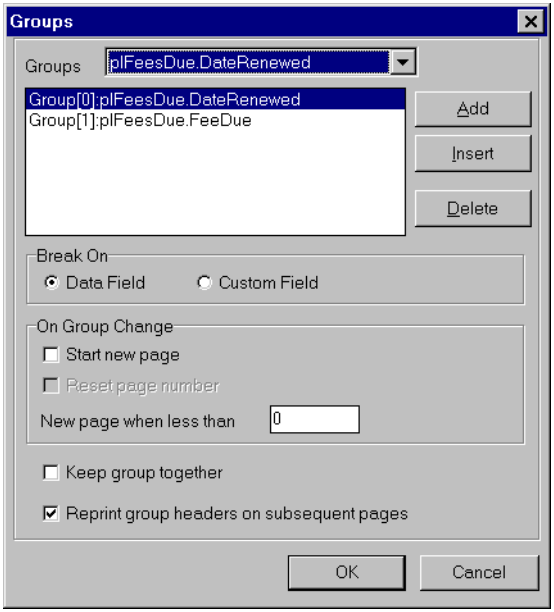


2. Select the desired format and click OK.

Setting Page Breaks for Grouped Reports

If you have grouped a report so that it collects data based on the content of certain data fields, you can control whether Personnel Director starts a separate page when the group changes. For example, if you have grouped a report first by location then by department, you can set a page break each time the location changes.

1. From the Report menu, select Groups.



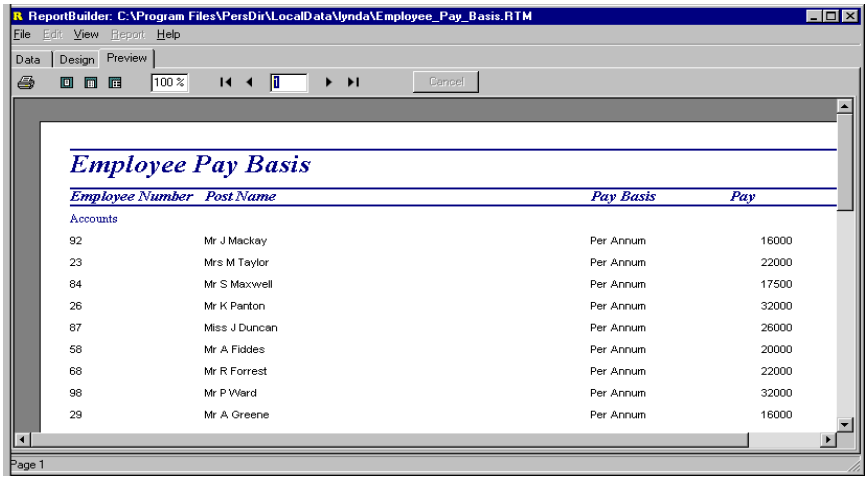
2. Do the following:

   - To set options on the basis of a data field on the report, leave data field selected. To set options based on a custom field, such as a label, click the Custom Field button. Select the report field from the drop-down list and click the Add button.
   - Under On Group Change, click the Start New Page to start a new report page each time the content of a data or custom group field changes. Selecting this option automatically selects the Reprint Group Headers on Subsequent Pages option.

Previewing the Design

You can preview your report to see how the design looks.

- Click the Preview tab in the Page Designer. This displays the first page of a report.


ReportBuilder: C:\Program Files\PersDir\LocalData\lynda\Employee_Pay_Basis.RTM
File Edit View Report Help
Data Design Preview
100 %
Cancel
Employee Pay Basis
Employee Number Post Name Pay Basis Pay
Accounts
92 Mr J Mackay Per Annum 16000
23 Mrs M Taylor Per Annum 22000
84 Mr S Maxwell Per Annum 17500
26 Mr K Panton Per Annum 32000
87 Miss J Duncan Per Annum 26000
58 Mr A Fiddes Per Annum 20000
68 Mr R Forrest Per Annum 22000
98 Mr P Ward Per Annum 32000
29 Mr A Greene Per Annum 16000
Page 1

The layout appears in the Preview window. If you are viewing a report, the contents of the first page appears in Whole Page view. For instructions on using the buttons on the Preview screen, see "Displaying Reports" on page 387.

- To change the view, use the Zoom buttons or type the desired percentage in the Zoom field.

- To print the contents of the window, click the Print button on the toolbar, or select Print from the File menu.
- To continue working on your design, click the Design tab.

18 BATCH INPUT AND GLOBAL UPDATES

Overview

There are several ways to expedite entering and changing information in the Personnel Director database.

- The first method is to perform Batch Inputs to the database.

  Use Batch Inputs to create new records in the database.

  For example, use Batch Inputs to enter new employee details in one batch or to create training records for a group of employees who have attended the same course.

- The second method is to perform Global Updates.

  Use Global Updates to update existing records or perform calculations on fields in existing records and store the result in a new record.

  For example, use the Global Update feature to update pay, absence, benefit, training, or any other type of record for a group of employees. If a new contract means a 10% increase in pay, you can use Global Update to add 10% to the pay and store the result in a new record.

  Important Note: *Be sure that you backup your database before using the Batch Input or Global Update functions. Using the backup, you can undo the input or update by restoring the database. If you want to try the examples in this chapter, use the Example database provided with Personnel Director.*

- The third method is to implement pay increases for groups of employees.

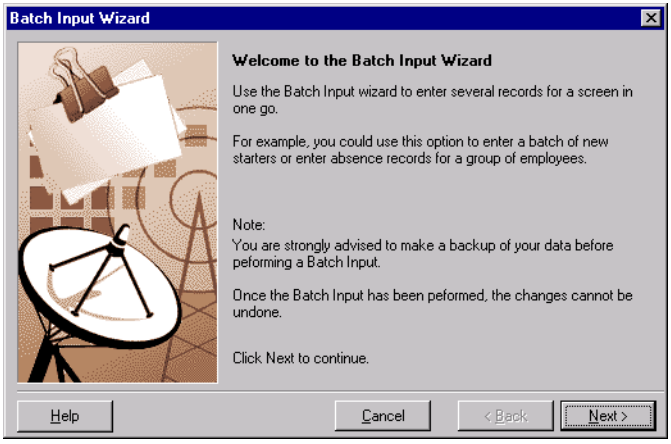
  You can increase pay by a percentage or by a fixed amount for individuals, groups or selected employees you have defined using a filter.

Using the Batch Input Wizard

The following procedures describe how to start the Batch Input Wizard. The example shows how you can create Medical History records for employees receiving a flu vaccination.

1. Select Batch Input from the Tools menu.

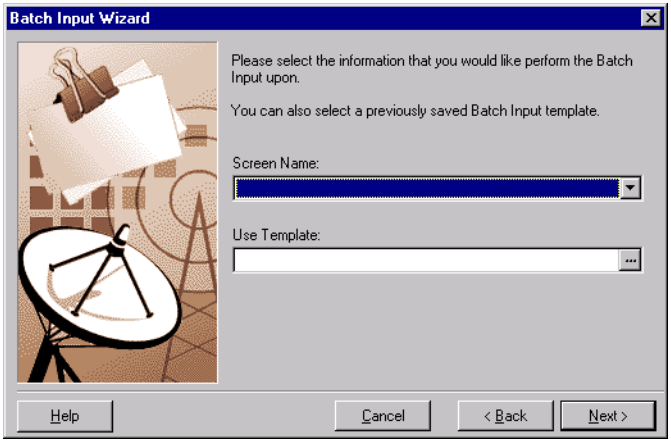
   The Batch Input Wizard appears.


Batch Input Wizard
Welcome to the Batch Input Wizard
Use the Batch Input wizard to enter several records for a screen in one go.
For example, you could use this option to enter a batch of new starters or enter absence records for a group of employees.
Note:
You are strongly advised to make a backup of your data before peforming a Batch Input.
Once the Batch Input has been peformed, the changes cannot be undone.
Click Next to continue.
Help
Cancel
< Back
Next >

2. Click the Next button.

What Information Is To Be Entered?

3. Select the screen where batch input is to occur.


Batch Input Wizard
Please select the information that you would like perform the Batch Input upon.
You can also select a previously saved Batch Input template.
Screen Name:
Use Template:
Help
Cancel
< Back
Next >

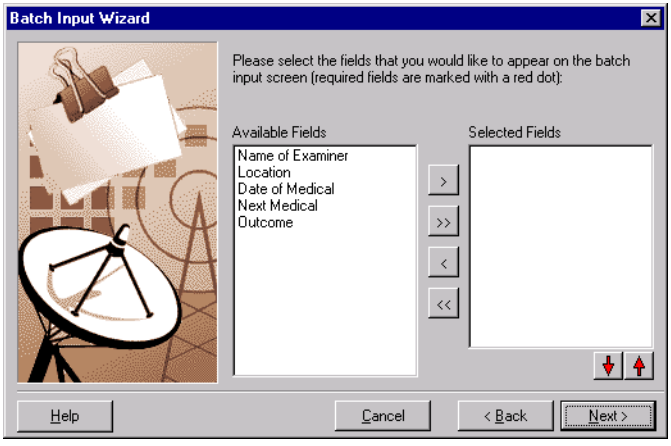
- Select the name of the screen from the drop-down list.

  To add the flu vaccination to the medical history records of the employees, here we would select Medical History.

4. Click the Next button.

What Fields To Be Added?

5. Specify the fields that you want to enter.:



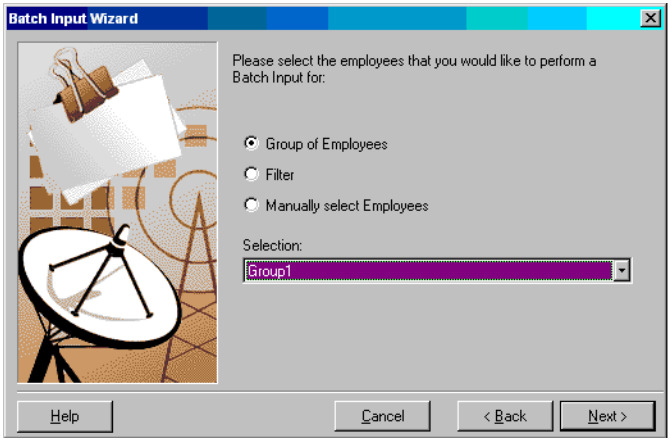
In this example, we would add the following fields in this order.:

Date of Medical	01/15/99
Name of Examiner	Dr Brown
Location	Office
Outcome	Flu Vaccination

6. Click the Next button.

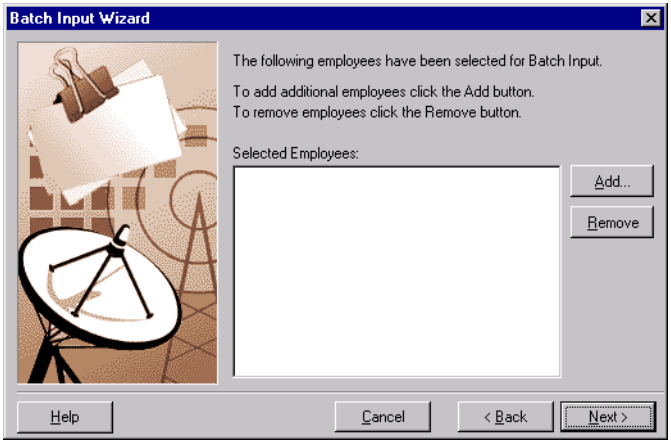
Who Is To Be Included?

7. Identify whose information is to be entered.



- To include only employees belonging to a specific group, click Group Of Employees. Select the group that you want to use from the drop-down list.
- To include only employees as identified by an Employee Filter, click Filter. Select the filter that you want to use from the drop-down list.
- To include only employees you select, click Manually Select Employees.

In this example, we want to specify which employees had the vaccination, so we would click Manually Select and then click the Next button.

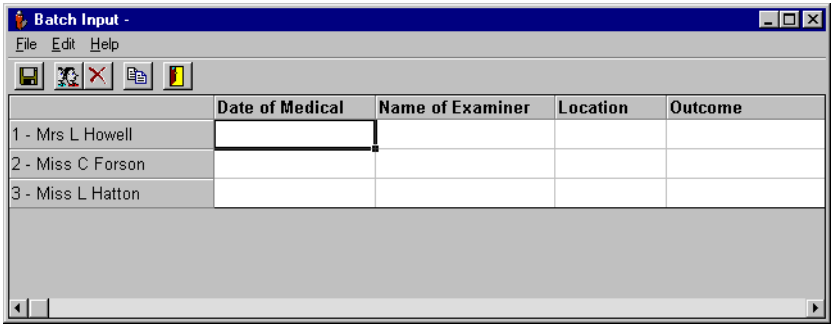


- To add one or more employees, click the Add button. Select one or more employees, and click OK.
- To remove one or more employees, select the employees in the list and click the Remove button.

  In this example, the employees who had the vaccination were Howell, Forson and Hatton, so we would add these employees and then click the Next button.

What Data is to be Entered?

8. Enter the data.



Do one of the following:

- Type the information in the appropriate fields.

- To add one or more employees to the list, click the Add Employee button, select the employees you want, then click OK.

- To duplicate the contents in one record to all subsequent records, click the Duplicate button.

- To remove an employee from the list, select the record and click the Remove Employee button.

- To exit, click the Close button (or from the File menu, select Exit).

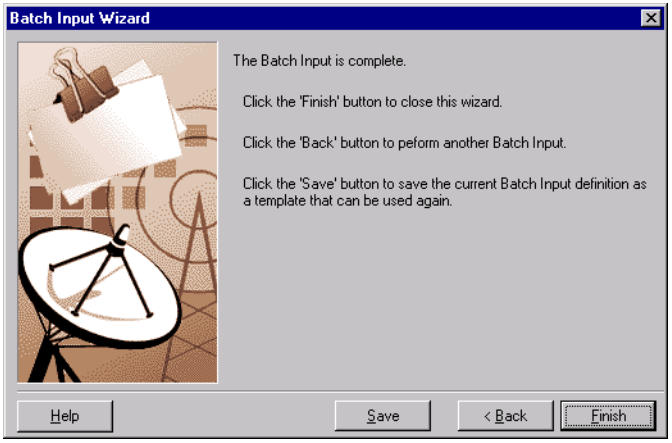
In this example, we want to add the following information:

Name of Examiner	Dr Brown
Location	Clinic
Date of Medical	Donaghy 01/15/99 Slattery 01/04/99 Pearce 01/11/99
Outcome	Flu Vaccination

9. To add the data to Personnel Director, click the Batch Input button.
10. To confirm that you want the data added, click Yes.

    Personnel Director informs you of the number of records that were added successfully.

Finish!


Batch Input Wizard
The Batch Input is complete.
Click the 'Finish' button to close this wizard.
Click the 'Back' button to peform another Batch Input.
Click the 'Save' button to save the current Batch Input definition as a template that can be used again.
Help
Save
< Back
Finish

11. To save the definition as a Batch Input Template, click the Save button. Name the template and click Save. Batch Input Template files are assigned a filetype of .BTM.
12. To exit the Batch Input Wizard, click the Finish button

Using the Global Update Wizard

The following procedures describe how to start the Global Update Wizard, and provide details for updating pay records by performing a calculation and storing the results in a new record.

Note: *Ensure that you try the following example of globally updating pay history using the Example database provided with Personnel Director.*

1. Select Global Updates from the Tools menu.
2. A message reminds you to back up your database before performing a global update. Click OK.

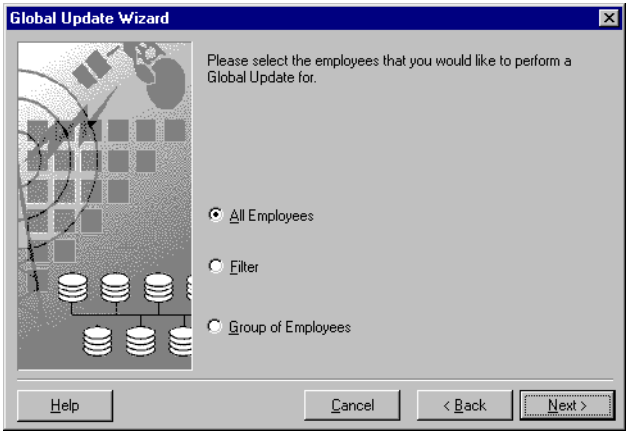
The Global Updates Wizard appears.

Global Update Wizard
The Global Update Wizard will help you to:
Update the information on existing employee records.
For example, you could use this option to change employee departments to reflect a company reorganistion.
Create new records based on existing information with the specified updates applied.
For example, you could use this option to create new pay records to reflect a salary review, preserving the pay history.
Note:
Changes made will not be reversible, you are therefore strongly advised to make a backup of your data first.
Click Next to continue.
Help
Cancel
< Back
Next >

3. Click the Next button.

Who Is To Be Included?

4. Identify whose information is to be globally updated.



- To include all employees, click All Employees.
- To include only employees as identified by an Employee Filter, click Filter. Select the filter that you want to use from the drop-down list.

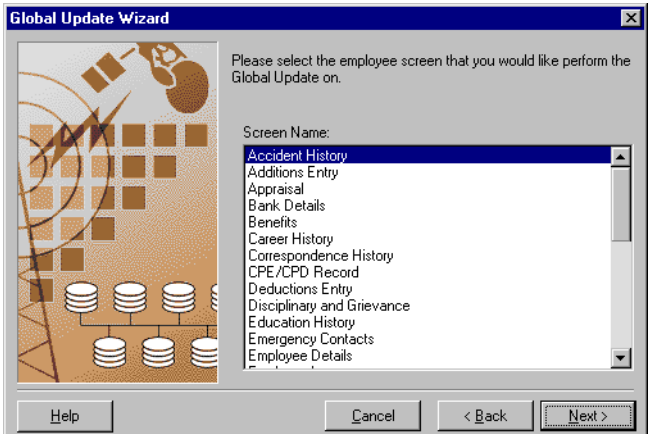
- To include only employees belonging to a specific group, click Group Of Employees. Select the group that you want to use from the drop-down list.

To add a 10% pay increase to the pay records of employees in the sales group, you would select the group “Sales Staff”.

5. Click the Next button.

What Information Is To Be Included?

6. Select the screen where the global updates are to occur.



- Select the name of the screen from the list.

To create a pay record, the Pay History screen is required. Select Pay History.

7. Click the Next button.

Create New or Update Existing Records?

8. Indicate if you want to update existing pay records or create new ones.

Global Update Wizard
Please select the type of Global Update that you would like to perform.
Update Existing Records
Apply the specified updates to existing records.
For example, you could use this option to change employee departments to reflect a company reorganistion.
Create New Records
Apply the updates on new records created as copies.
For example, you could use this option to create new pay records to reflect a salary review, preserving the pay history.
Help
Cancel
< Back
Next >

- To update existing records, click the Update Existing Records option.
- To create new records, click the Create New Records option.

To create a new record with a pay increase of 10%, select the Create New Records radio button.

9. Click the Next button.

Which Records Are To Be Included?

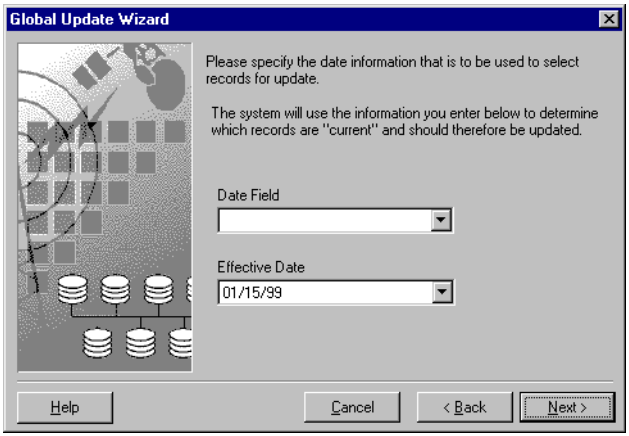
10. Indicate whether you want to update all pay records or just the current pay record.

Global Update Wizard
Please specify the method that should be used to select records for update.
Select All Records
All records for the employees on the specified screen will be updated.
Select Current Records
Records for update will be selected based on the date field that you enter during the next step.
Help
Cancel
< Back
Next >

- To update or create all the records on the specified screen for all the selected employees, click the Select All Records option and click the Next button. See step 12.
- To only update or create records based on a specific date, click the Select Current Records option and click the Next button.

In this example, you do not want to create new records for all pay records, just a new record based on the current pay record. To do this, select the Select Current Records radio button and click Next.

11. If you chose the Current Records option, specify the date.


Global Update Wizard
Please specify the date information that is to be used to select records for update.
The system will use the information you enter below to determine which records are "current" and should therefore be updated.
Date Field
Effective Date
01/15/99
Help
Cancel
< Back
Next >

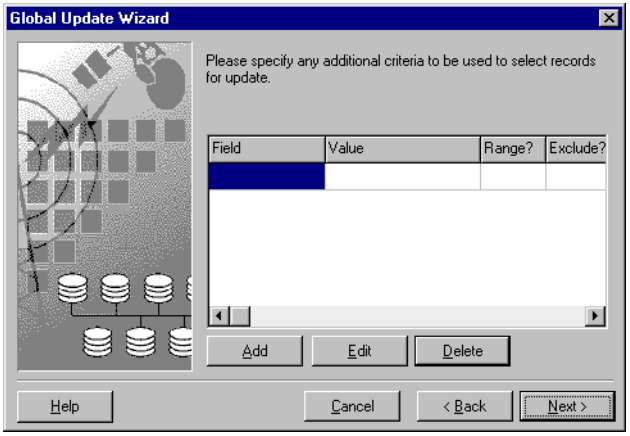
- Select the type of date from the Date field drop-down list.
- Select or type the effective date.

Here, you want to select the field which will be used to determine if a pay record is current (From Date) and type the date when the current record will be selected (January 1, 1998). Select From Date from the Date Field drop-down, then select the date to be used as the Effective Date.

12. Click the Next button.

Additional Records To Include or Exclude?

13. Specify any additional criteria to include or exclude records from the Global Update.



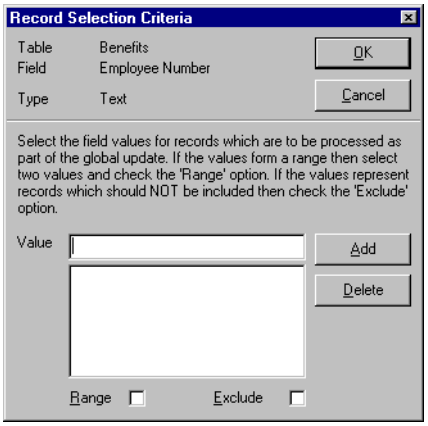
- To add additional criteria, click the Add button. See step 13.
- If there is no additional criteria, click the Next button. See step 15.
- To correct selection criteria you previously entered, select the line and click the Edit button.
- To delete selection criteria, select the line and click the Delete button.

In this example, you need to add additional criteria so that only salary paid employees are updated (not hourly or shift). Click the Add button.

14. If you are adding additional selection criteria, do the following:
    - Select the field to be used for identifying the records to be created or updated.

Select PayBasis from the drop-down list and click OK

- Specify the criteria.


Record Selection Criteria
Table
Benefits
Field
Employee Number
Type
Text
OK
Cancel
Select the field values for records which are to be processed as part of the global update. If the values form a range then select two values and check the 'Range' option. If the values represent records which should NOT be included then check the 'Exclude' option.
Value
Add
Delete
Range
Exclude

  To set a single value as the selection criteria, select or type the value in the Value box and click Add.

  To set a range of values as the selection criteria, add the first value by selecting or typing the value in the Value box and clicking Add. Add the second value using the same procedure, then click the Range checkbox.

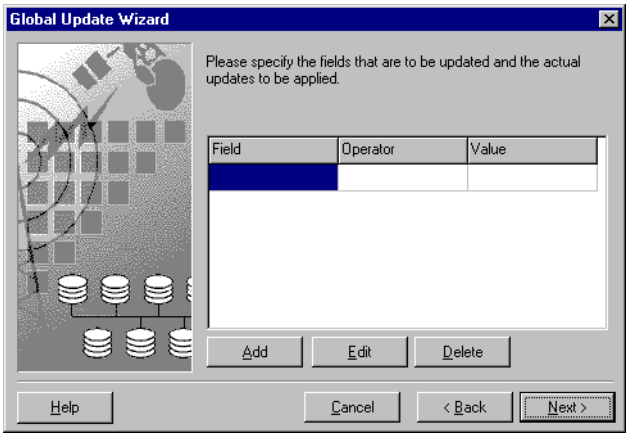
  To exclude records with this selection criteria, click the Exclude checkbox.

  In this example, you only want salaried employees, so select Per Annum from the drop-down list. Then click the Add button (be sure to click this button before clicking OK).

- Click OK. Return to step 12 if you need to specify other criteria for the update; otherwise click the Next button.

What Fields Are To Be Added or Updated?

15. Specify the fields to be added or updated in the selected records.

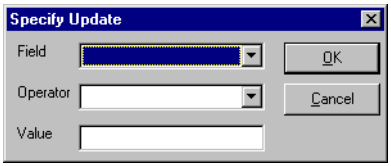


- To add or update a field, click the Add button. See step 15.
- If there are no further additions, click the Next button.
- To correct a field you previously entered, select the line and click the Edit button.
- To delete a field, select the line and click the Delete button.

In this case you want to add two criteria:

- An increase in pay of 10%
- A from date of January 28, 1999.

16. If you are adding or replacing a field, do the following.



- Select the first field to update from the Field Name drop-down list.
- Select the operator to apply from the Operator drop-down list.
- Enter the value that you want to create in the field.
- Click OK. Return to step 15.

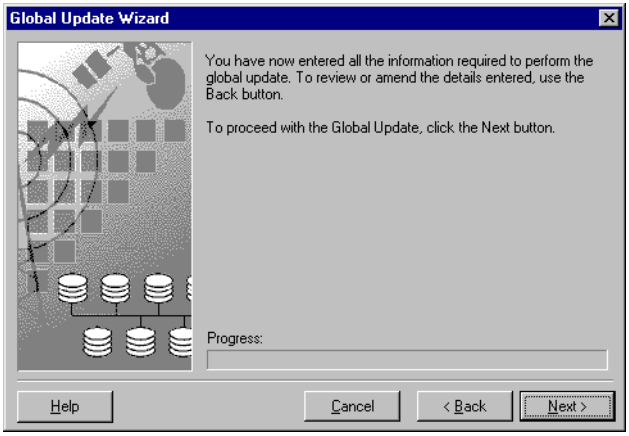
To add the two criteria, enter the following:.

Field Name	Operator	Value
Pay	Add %	10
From Date	Set To =	28/01/1999 (in Windows settings format)

17. When you finish entering criteria, click Next.

Finish!

18. To run the global update, click the Next button


Global Update Wizard
You have now entered all the information required to perform the global update. To review or amend the details entered, use the Back button.
To proceed with the Global Update, click the Next button.
Progress:
Help
Cancel
< Back
Next >

Personnel Director updates the fields in the selected records and adds the percentage pay increase to the pay records of the Sales Staff group.

19. To end the process, click the Finish button.

Implementing Employee Pay Increases

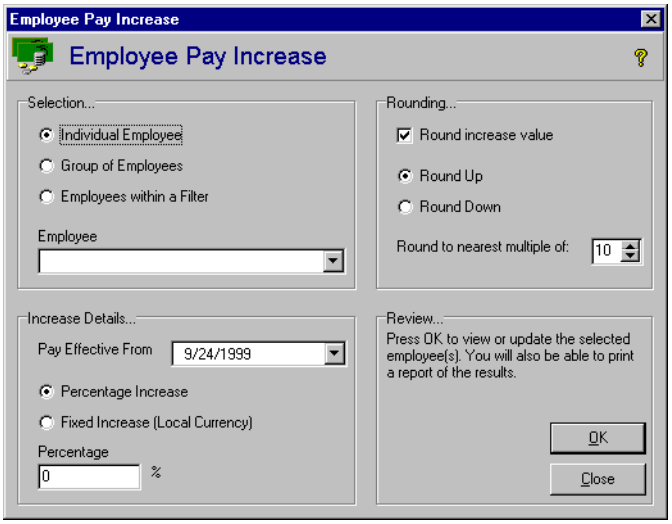
You can calculate, review and implement pay increases for one or more employees. You can enter a fixed amount or a percentage increase in local currency, based on the employee's current pay rate. Personnel Director can round the resulting increase to a multiple you select.

***Note**: Before applying a fixed increase to all employees, create a filter to separate employees paid on a salary from those on an hour rate and use it to apply the increase; for example, if you were to apply a fixed update of 100 pounds to all employees, those on salaries would receive an increase of 100 pounds per year and those on hourly rates would receive 100 pounds an hour. Creating and using filters will avoid this problem.*

Entering Pay Increases

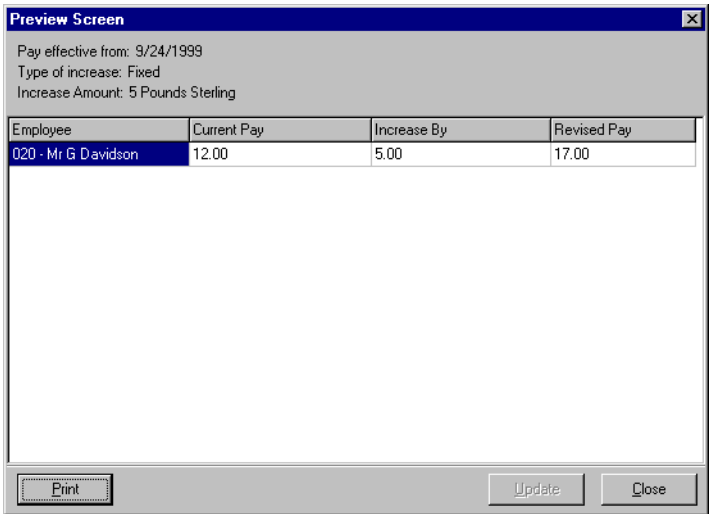
After you enter pay increase details, you can view the results on a Preview screen, and decide to apply the increases and print a report, or close the Preview screen and re-enter the increase details.

1. From the Tools menu, select Employee Pay Increase.



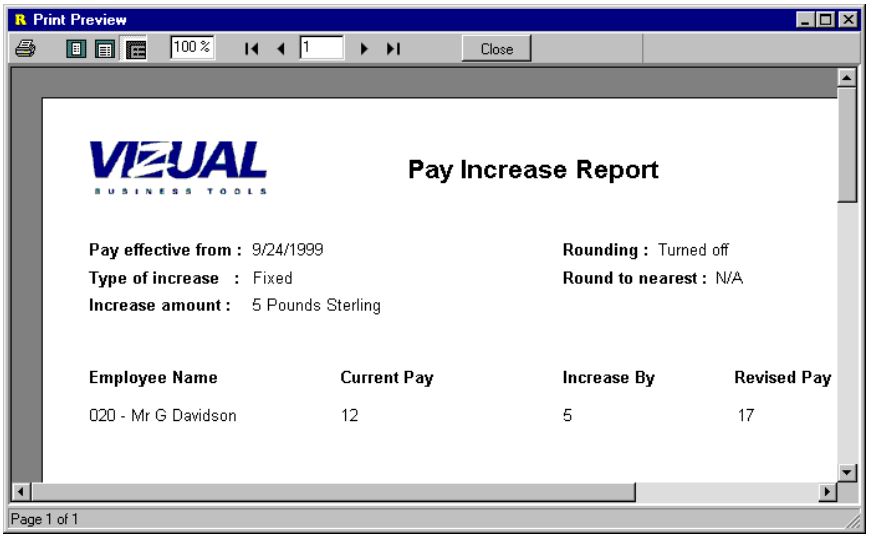
2. Take one of the following actions.
   - To increase pay for one employee, click the Individual Employee button, then select the employee name from the drop-down list.
   - To increase pay for a group click the Group of Employees button, then select the group from the drop-down list.
   - To increase pay for employees for whom there is a defined filter, click the Employees Within a Filter button, then select the filter from the drop-down list.
3. Select the date on which the pay increase becomes effective by clicking the calendar button and selecting a date.
4. Take one of the following actions.
   - If the increase is a percentage of the current pay rate or salary, click the Percentage Increase button. Then enter the percentage increase in the Percentage box.
   - If the increase is a fixed amount, click the Fixed Increase button. Then enter the amount in the Increase Amount box.

5. To have Personnel Director round the increase to the nearest multiple, in the case of percentage increase, click the Round Increase Value checkbox.
   - Click Round Up or Round Down to round to the nearest higher or nearest lower multiple.
   - Select the multiple or type it in the Round to Nearest Multiple Of box. For example, if the increase based on a percentage was 233, you would select round up and 5 to round to 235.
6. Click OK in the Review pane to view the results.



7. A message reminds you to back up your database before performing an employee pay increase. Click OK.

8. Do the following:
   - If the results are satisfactory, click the Update button to effect the increase. Click Yes to confirm that you want to perform the pay update.
   - Click the Print button to print a report of the increase.



   - If the results are not what you anticipated, click the Close button and change the options, then click the OK button again.

19 MAINTAINING PERSONNEL DIRECTOR DATABASES

Use the Personnel Director Database Maintenance Module to create and maintain a list of available databases for Personnel Director users. Also use the Database Maintenance Module to import data from other sources, refresh calculations in a database and to purge data from a Personnel Director database.

Following is a quick reference to the syntax for accessing files on the network based on the network protocol.

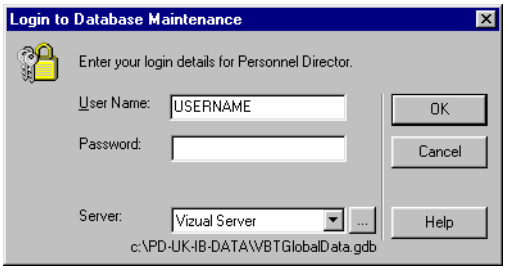
Network Protocol	Syntax/Example
TCP/IP	*server*:drive:*path*...*filename.filetype* Example: SERVERA:C:\PERDIR\VBTGlobalData.gdb
NetBEUI	*server**drive**path*...*filename.filetype* Example: \\SERVERA\C:\PERDIR\VBTGlobalData.gdb
IPX/SPX	*directoryshare*@*volume*:*path*...*filename.filetype* Example: PERDIR@SERVERA:\VBTGlobalData.gdb
UNIX	*server*:*drive*:/*path*.../*filename.filetype* Example: SERVERA:C:/PERDIR/VBTGlobalData.gdb

Starting the Database Maintenance Module

Before you start the Database Maintenance Wizard, ensure that no other Personnel Director programs are running—the Personnel Director, Diary or the Diary Monitor, Security Manager or Screen Designer.

1. From the Start menu, select Programs>Vizual Business Tools>Personnel Director>Database Maintenance

   The Database Maintenance Login screen appears.



2. Provide your user name, password and the server where the Personnel Director database you want to use is located. For further instructions, see "Starting Personnel Director and Logging In" on page 32. For further instructions, see "Starting Personnel Director and Logging In" on page 32.

   ***Note**: Click the button to the right of the drop-down list button to maintain the list of servers.*

3. Click OK.

   The Database Maintenance screen appears.

To exit the Database Maintenance Module

- Click the Close button.

  -or-

  From the File menu, select Exit.

Maintaining Personnel Director Servers

You can perform the following functions from any Personnel Director login screen on a client workstation. A change on one workstation updates the server definition on all other workstations running Personnel Director on your network.

To add a server (either on your LAN or a remote server at another site)

1. On the login screen, click the Servers selection button.
2. Provide the following information:

   Description. Type a description or server name.

   Global Database. Type the full path to the Personnel Director Global database on the server. Use the path syntax required by your network protocol; the following is an example of TCP/IP syntax: PERDIR:C:\PERDIR\VBTGlobalData.gdb.
3. Click the Add button.

To update a server definition

1. On the login screen, click the Servers selection button.
2. Provide the following information:

   Description. Change the description or server name.

   Global Database. Change the full path to the Personnel Director Global database on the server.
3. Click the Update button.

To delete a server definition

1. On the login screen, click the Servers selection button.
2. In the Servers list, select the server you want to delete.
3. Click the Delete button.

Maintaining a List of Personnel Director Databases

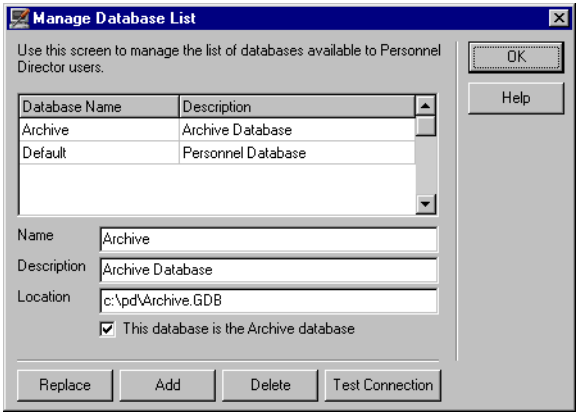
You can add or remove the Personnel Director databases that users can see when they select Open Database from the File menu. You can also test the connection for a specific database in the list.

1. Click the Maintain Database List button.

   -or-

   From the File menu, select Maintain Database List.

   The Maintain Database List screen appears.



2. From this screen, you can add, rename or remove databases in the list. You can also test the connection to a database. When you are finished, click OK to exit.

To add a database to the list

1. Provide the following information:

   Name. Type the name of the database that you previously created. For instructions on how to create a database; see "Creating a New Personnel Director Database" on page 442.

   Description. Type a description of the database.

Location. Type the server and folder location of the Personnel Director database on the server according to the syntax for the network protocol being used.

For example if TCP/IP is being used, use the syntax: *server-name*:*drive**path**filename.ext* so that it looks similar to VBTServer:c:\PD\Demodata.gdb.

The path you enter here is the path to the database as the server sees it, not as the client workstation sees it (as a shared drive).

2. Click the Add button.
3. Test the connection.
   - Click the Test Connection button.
   - When the results appear, click OK.

To remove a database from the list

1. Select the database you want to remove and click the Remove button.
2. Click OK to confirm the deletion.

To change a database's name or description

1. Select the database where the name or description is to be changed.

   Name. Type a new name for the database.

   Description. Type a new description for the database.
2. Click the Replace button.

To test a database connection

1. Click the Test Connection button.
2. When the results appear, click OK.

Creating a New Personnel Director Database

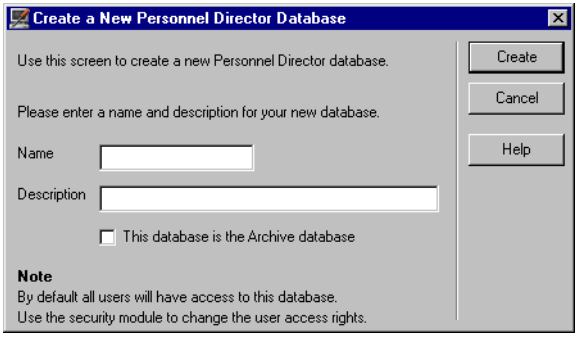
You can create a new Personnel Director database whenever one is required.

1. Click the Create Database button.

   -or-

   From the File menu, select New Database.

   The Create a New Personnel Director Database screen appears.


Create a New Personnel Director Database
Use this screen to create a new Personnel Director database.
Please enter a name and description for your new database.
Name
Description
This database is the Archive database
Note
By default all users will have access to this database.
Use the security module to change the user access rights.
Create
Cancel
Help

2. Provide the following information:

   Name. Type the name of the database.

   Description. Type a description of the database.

   This Database Is The Archive Database. Click this checkbox if this database is to be an Archive database. (This is the database where employee records are transferred when you select Archive Employees or Archive Leavers from the Employees menu.)

3. Click the Create button.

   To make this database available to users, add it to the database list. The database is automatically added to the Database List, see "Maintaining a List of Personnel Director Databases" on page 440.

Importing Data from Other Sources

You may have employee data that is already in electronic form, perhaps in an existing database, spreadsheet, or payroll program. If you can save this data in a file with a field delimiter character format, such as Comma Separated Value format or Tab Delimited (see “Preparing Data for Import” on page 443), you can transfer this data directly into a Personnel Director database. Importing is the process of transferring external data (in the form of a file) to the Personnel Director database, thereby saving large amounts of manual input.

To import data, you create *import definitions*. An import definition is a template that defines the data and the sequence in which it is to be imported. Once created, you can use a definition repeatedly by selecting it from a list.

Preparing Data for Import

Employee data that you want to import will probably be in an existing database, spreadsheet or payroll program. In order to import it, you need to put it in the form of a text file.

Text files of data for importing must conform to the following rules:

- Each employee record to be imported must have a unique employee number.
- Any dates must be in the same format.
- The fields must be separated by one of the following delimiter characters. The comma is the default.

Description	Character
Comma	,
Semi-colon	;
Hash symbol	#
Pipe symbol	|
Asterisk	*
Tab	
Space	

- Text strings must be bracketed by one of the following qualifiers at the beginning and end of each string. The double quote is the default.

Description	Character
Double quote	“
Single quote	’
Ampersand	@
Asterisk	*
Hash symbol	#

  For example, in a comma-separated delimiter file format that uses double quotes as text qualifiers, each item (or “field”) in the file is separated by a comma, but no spaces. Text fields are surrounded by double quotes. For example:

```
001,"Jones","Mary",01/05/1969,"Bristol,"Sales"
002,"Smith","David",02/04/1959,"London","Marketing"
```

  The example shows data for two employees. The first field in each line is the Employee Number, followed by Surname, Forename, Date of Birth, Division, and Department. Each line in the file must follow exactly the same sequence of fields.

The import definition that you use to import the data interprets what data is coming into Personnel Director. Therefore, the definition needs to represent the exact sequence of fields and data format of the import file. In the example above, the definition would need to indicate to Personnel Director that each line of incoming data contains the Employee Number, Surname, Forename, Date of Birth, Division and Department, is in a Comma Separated Value file format and uses double quotes for text qualifiers.

When importing a data file, if you already have a definition set up to import data in the correct sequence and file format, you can use that import definition. If not, you need to create a new import definition.

Creating Data Files for Import

Before creating a data file for import, ensure that you are aware of the rules for creating these files, described in "Preparing Data for Importing" above.

1. Use a word processor or spreadsheet program to create a text file that contains the data to be imported.
   - Save the file as a Text File, and note the name and location of the file.
2. Note the position of each field in the text file to be imported. For example, consider the following text file, in Comma Separated Value format:

   ```
   001,"Jones","Mary",01/05/1969,"Bristol,"Sales"
   002,"Smith","David",02/04/1959,"London","Marketing"
   ```

3. Make a list of the fields, similar to the following example.

Position	Field Name
1	Employee Number
2	Forename
3	Surname
4	Date of Birth
5	Division
6	Department

4. Ensure that text fields are identified by a text qualifier.

If you already have an import definition designed to import data in the format used in your text file, you can now import data, as described in "Importing Data using Import Definitions" on page 446.

Importing Data using Import Definitions

The procedures in this section describe how to create and use import definitions to import data. An import definition is a template that defines the data and the sequence in which it is to be imported. Once you create a definition, you can reuse by selecting it's name from a list.

To create and use a new import definition

1. Before starting, you need to know the data fields in the file to be imported, their sequence, and the file format.
   - Refer to "Creating Data Files for Import" on page 445. Even if you are not creating the import data file at this time, create the list of fields as described in that procedure and note the file format.
2. Open the database where you want to import the data.

   - Click the Open Database button.

     -or-

     From the File menu, select Open Database.
   - Select the Personnel Database where you want to import data into and click OK.

3. Click the Import Data button.

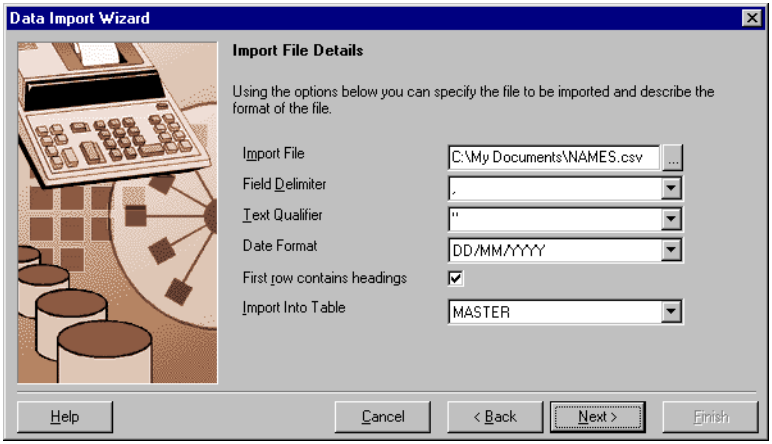
   -or-

   From the File menu, select Import Data.

The Data Import Wizard dialog appears.

Data Import Wizard
Welcome to the Import Wizard
This wizard will guide you through the steps required to import data from a text file into the Personnel Database. Please select the wizard option you require and then click Next to continue.
I want to create and use a new import definition
I want to use/edit an existing import definition
I want to delete an existing import definition
Help
Cancel
< Back
Next >
Finish

4. To create a new import definition, click the I Want To Create And Use a New Import Definition button.
5. Click Next. The Import File Details dialog is displayed.



6. Do the following:

   Import File. Click the Browse button to locate the file that you want to import. Double click the file or select it and click the Open button.

   Field Delimiter. Select the field delimiter character from the drop-down list.

   Text Qualifier. Select the text qualifier character from the drop-down list.

Date Format. Select the date format used in the import file from the drop-down list.

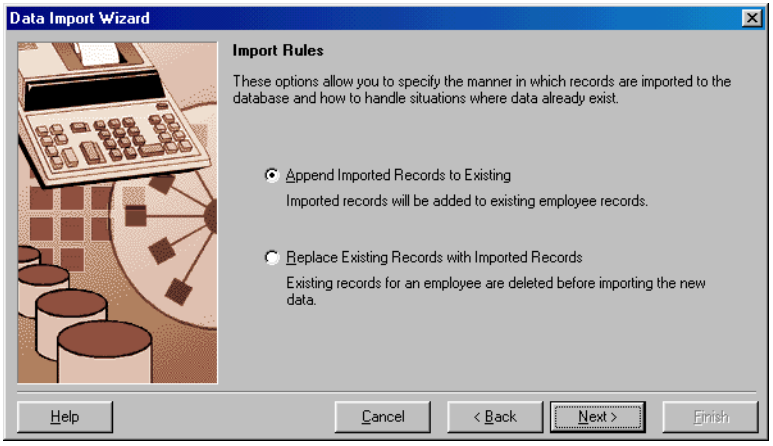
First Row Contains Headings. If the first row of the import file contains headings, click the First Row Contains Headings checkbox; if not, clear the checkbox.

Import Into Table. Select the name of the Personnel Director table from the drop-down list to be used for the data being imported. To import names, addresses or any other data that appears on the Personnel Director main screen, select Master from the list.

7. Click Next.

   The Import Rules screen appears.

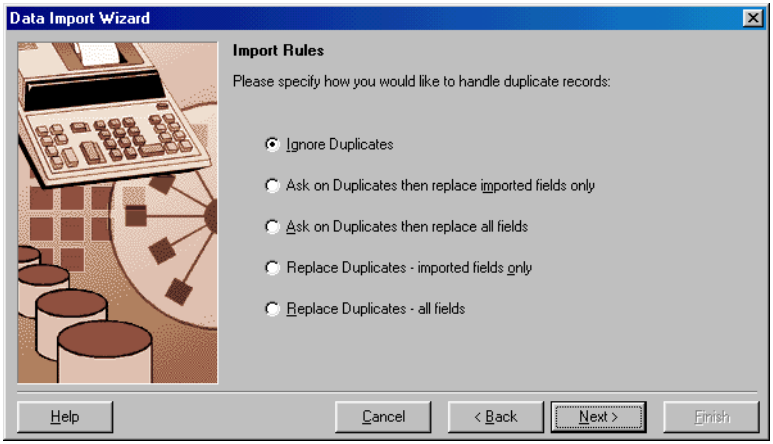
   - If you are importing records into a table other than Master, this version of the Import Rules screen appears.


Data Import Wizard
Import Rules
These options allow you to specify the manner in which records are imported to the database and how to handle situations where data already exist.
Append Imported Records to Existing
Imported records will be added to existing employee records.
Replace Existing Records with Imported Records
Existing records for an employee are deleted before importing the new data.
Help
Cancel
< Back
Next >
Finish

Append Imported Records To Existing. To append the imported records to the end of the file, click this option.

Replace Existing Records With Imported Records. To replace the existing records with the ones you are importing, click this option.

- If you are importing records into the Master table, this version of the Import Rules screen appears:


Data Import Wizard
Import Rules
Please specify how you would like to handle duplicate records:
Ignore Duplicates
Ask on Duplicates then replace imported fields only
Ask on Duplicates then replace all fields
Replace Duplicates - imported fields only
Replace Duplicates - all fields
Help
Cancel
< Back
Next >
Finish

Specify how you would like Personnel Director to handle duplicate records. Duplicate records exist when you try to import a record which already exists in Personnel Director. For example, a duplicate record would occur if you tried to import two employee records with the same employee number (as this must be unique for each employee in Personnel Director).

If you are importing employee details into a field that currently exists in Personnel Director (such as Employee Number), select one of the following options.

Click the rules option you want to use for the import.

Ignore Duplicates. The import record is ignored and not imported into Personnel Director. No warning is displayed.

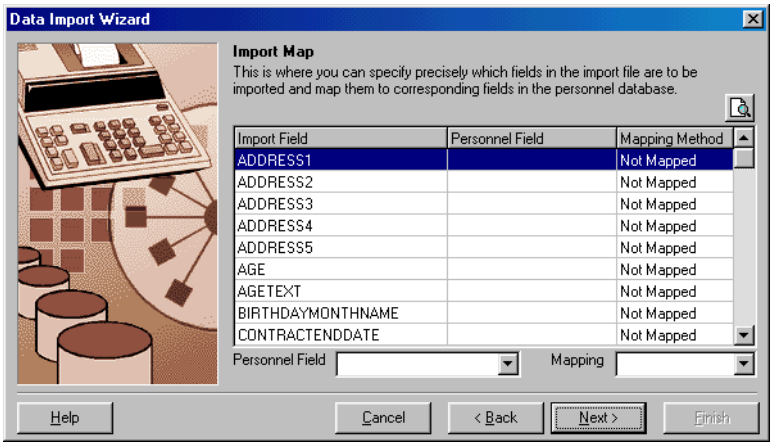
Replace Duplicates - all fields. The existing record is replaced by the imported record. All fields are replaced.

Replace Duplicates - imported fields only. The existing record is updated with the imported record fields.

Ask on Duplicates then replace all fields. If a duplicate record is found, you are given the option of cancelling the import, importing the record or ignoring the record. If you choose to import the record, then all fields will be replaced.

Ask on Duplicates then replace imported fields only. If a duplicate record is found, you are given the option of cancelling the import, importing the record, or ignoring the record. If you choose to import the record, then only imported fields are replaced.

8. Click Next. The Data Import Map dialog appears.



The Import field column contains all of the fields from the import file. To set up the import definition you must specify the Personnel Director field and its associated mapping method.

9. For each of the fields in the list, do the following:

- From the Personnel Field drop-down list, select the Personnel Director field to which to import the data.
- Select the Mapping Method from the drop-down list.

  Not Mapped. Omit the field from the import.

  As Is. Import the field as it appears in the import file.

  Upper Case. Import text as all upper case.

  Lower Case. Import text as all lower case.

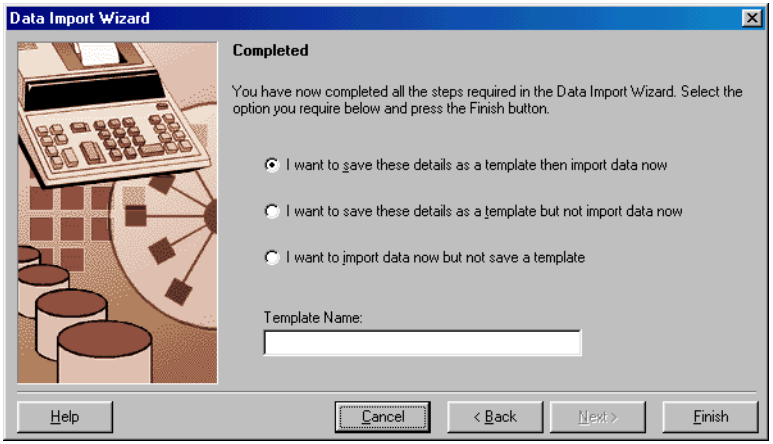
  Mixed Case. Import text as mixed case.

When selecting fields, do the following:

- To skip a field in the import file, select "Not Mapped" from the Mapping Method drop-down list. This keeps all fields in the correct field position, as defined in your list.

- Click the Preview button to check the integrity of the fields in the import file. If a field is invalid, click it to see a description of why. Click the Close button to close the Preview window.

10. When you finish mapping the fields, click Next.


Data Import Wizard
Completed
You have now completed all the steps required in the Data Import Wizard. Select the option you require below and press the Finish button.
I want to save these details as a template then import data now
I want to save these details as a template but not import data now
I want to import data now but not save a template
Template Name:
Help
Cancel
< Back
Next >
Finish

- Select one of the following options:

  I Want To Save These Details As A Template Then Import Data Now. To save the template and import the file immediately, click I Want To Save These Details As A Template Then Import Data Now.

  I Want To Save These Details As A Template But Not Import Data Now. To save the template without importing the file, click

  I Want To Import Data Now But Not Save A Template. To import the file but not save the template, click.

- Type a name for the template.

11. Click Finish.

    If you requested to import data, the data is now imported to the database.

12. If you are finished, click the Close Database button.

    -or-

    From the File menu, select Close Database.

To edit an existing import definition

1. Open the database where you want to update the import definition.

   - Click the Open Database button.

     -or-

     From the File menu, select Open Database.

   - Select the Personnel Database where you want to change the import definition into and click OK.

2. Click the Import Data button.

   -or-

   From the File menu, select Import Data.

3. Click the I Want To Use/Edit An Existing Import Definition option, then select the definition you want to edit from the drop-down list, and click Next.
4. Click Next and proceed through the screens, making any required changes to the import definition, as described in steps 5 through 12 of the procedure "To create and use a new import definition" on page 446.

Deleting an Import Definition

1. Open the database where you want to delete the import definition.

   - Click the Open Database button.

     -or-

     From the File menu, select Open Database.

   - Select the Personnel Database where you want to delete the import definition into and click OK.

2. Click the Import Data button.

   -or-

   From the File menu, select Import Data.

3. Click the I Want Delete An Existing Import Definition option, then select the definition you want to delete from the drop-down list.
4. Click the Next button.

5. Click Yes to confirm that you want to delete the definition.

6. If you are finished, click the Close Database button.

   -or-

   From the File menu, select Close Database.

Refreshing Calculations

Whenever necessary, you can refresh the calculations in a database to reflect changes to calculated fields. You can recalculate pay records, holiday allowances, and calculated values on any or all of the employee record screens. You can also schedule these refreshes; for more information, see "Scheduling Recalculation Refreshes" on page 455.

***Note**: Refreshing large databases requires time; for example, refreshing 10,000 pay records can take over 15 minutes to complete.*

1. Open the database where you want to perform the recalculate function.

   - Click the Open Database button.

     -or-

     From the File menu, select Open Database.

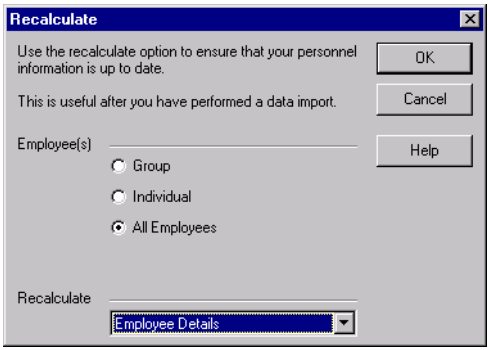
   - Select the Personnel Database where you want to recalculate the calculations and click OK.

2. Click the Recalculate button.

   -or-

   From the File menu, select Recalculate Data.

The Recalculate screen appears.



3. Provide the following information:

   Employees. Choose one of the following options: Group, Individual or All Employees.

   Recalculate. Select the category to be recalculated.

   For example, to recalculate values on all employee records, you would select the All Employees option, and select Employee Details from the drop-down list.

4. Click OK.

   The progress of the recalculation is displayed.

5. When the calculation is complete, click OK.

6. If you are finished, click the Close Database button.

   -or-

   From the File menu, select Close Database.

Scheduling Recalculation Refreshes

You can schedule refreshes of calculations for Personnel Director screens.

***Important Note 1**: To use this feature, you must first install the recalculation program.*

***Important Note 2**: Ensure that all users have exited Personnel Director and all of its modules before a scheduled refresh. If a user is logged into Personnel Director or its modules while recalculation is in progress, the recalculation may fail. Set schedules for times when users are not logged in.*

To install the recalculation program

1. Place the Personnel Director CD-ROM into the CD-ROM drive of the workstation.
2. Exit from the Personnel Director install program. Click Cancel and Exit Setup.
3. Open the folder Recalculate on the CD and double-click the file Setup.exe

   This installs the program, VBTRecalculate.exe, in the folder, c:\Program Files\Persdir, unless you specified otherwise.

To schedule a recalculation

1. Open the Task Scheduler. From the Start menu, select Programs> Open the Recalculate Scheduler. From the Start menu, select Programs> Vizual Business Tools>Personnel Director>Recalculate Scheduler.
2. Log into the Recalculate Scheduler.
3. Indicate how often and when recalculation is to be performed.
   - To recalculate on an hourly basis, click the Hourly option. Select or type the number of hours and the start time. For example, to schedule the recalculation every 2 hours starting at 10 in the morning, select 2 and 10:00 AM.
   - To recalculate on an daily basis, click the Daily option. Select or type the number of days and the start time. For example, to schedule the recalculation every 2 days starting at 10 in the morning, select 2 and 10:00 AM.

- To recalculate on an weekly basis, click the Weekly option. Click the checkboxes of the days of the week and the time at which the recalculation should be performed. For example, to schedule the recalculation at 10:00 AM on Tuesdays and Fridays, select or type 10:00 AM and click the Tuesday and Friday checkboxes.

4. When you are finished, click OK.

Populating Pick Lists

Whenever necessary, you can populate pick lists with data currently residing in pick fields. This is especially useful after you imported records into the Personnel Director database, so that you can update pick lists to reflect the current items being used.

1. Open the database where you want to populate pick list fields.

- Click the Open Database button.

  -or-

  From the File menu, select Open Database.

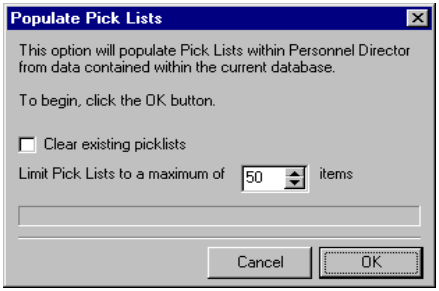
- Select the Personnel Database where you want to populate pick list fields and click OK.

2. Click the Populate Pick Lists button.

   -or-

   From the File menu, select Populate Pick Lists.

   The Populate Pick Lists screen appears.


Populate Pick Lists
This option will populate Pick Lists within Personnel Director from data contained within the current database.
To begin, click the OK button.
Clear existing picklists
Limit Pick Lists to a maximum of
50
items
Cancel
OK

3. Provide the following information:

   Clear Existing Pick Lists. Click this checkbox to remove all items from existing pick lists before recreating them.

   Limit Pick Lists to a Maximum of _ Items. Select or type the maximum number of items to be in each pick list.

4. Click OK.

Purging Data from a Personnel Director Database

Over time the volume of historical employee data will build up, making it difficult to locate particular records. To overcome this problem, you can purge historical data.

WARNING: Purging data will permanently delete the data from your database, so you should proceed with caution. Before using this function, you should have a current backup of your data.

1. Open the database where you want to purge data.

   - Click the Open Database button.

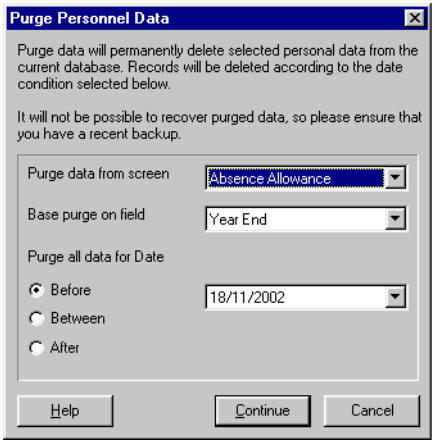
     -or-

     From the File menu, select Open Database.

   - Select the Personnel Database where you want to purge data and click OK.

2. Click the Purge Data button or- from the File menu, select Purge Data.

   The Purge Personnel Data screen appears.


Purge Personnel Data
Purge data will permanently delete selected personal data from the current database. Records will be deleted according to the date condition selected below.
It will not be possible to recover purged data, so please ensure that you have a recent backup.
Purge data from screen
Absence Allowance
Base purge on field
Year End
Purge all data for Date
Before
Between
After
18/11/2002
Help
Continue
Cancel

3. Provide the following information:

   Purge Data From Screen. Select the screen where the data is located (type of data to be purged); for example, Absence or Pay History.

   Base Purge On Field. Select the field to be used to filter records for the purge, such as the Holiday and Absence End Date).

   Purge All Data for Date:

   Before. Enter or select the date before which data is to be purged. For example, to purge absence records that occurred before the 1st of January 2002, you would type 1/1/2002 or use the calendar button to select the date.

   Between. Enter or select the From date and To Date to purge data between dates. For example, to purge absence records that occurred between the 1st of January 2002 and 1st February 2002, you would type 1/1/2002in the From Date and 1/2/2002 in the To Date or use the calendar button to select the dates.

   After. Enter or select the date after which data is to be purged. For example, to purge absence records that occurred after the 1st of January 2002, you would type 1/1/2002 or use the calendar button to select the date.

4. Click Continue.

5. To confirm the purge, click Yes.

6. If you are finished, click the Close Database button.

   -or-

   From the File menu, select Close Database.

Using the Database Maintenance Utilities

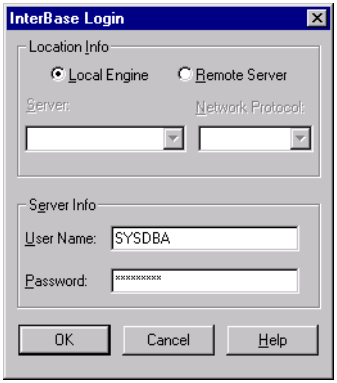
This section is a summary of the main InterBase utilities. For complete instructions, see your InterBase manuals and online help.

***Important Note**: Do not delete the SYSDBA User Id. The SYSDBA account is used to administer the InterBase database server and is the only account that is authorized to perform functions such as database repair, user account Starting and Exiting the Database Manager*

To perform database maintenance, you use the InterBase Server Manager. The InterBase Server Manager is optionally installed as part of the InterBase Client Software. For further instructions, see “Part 2: Installing Personnel Director on a Workstation” on page 17.

To start the InterBase Server Manager and login to a server

1. From the Start button, select Programs>InterBase>Server Manager.
2. Select File>Server Login



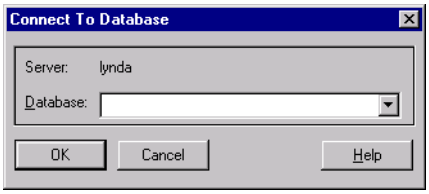
Provide the following information in the Server Info section:

User Name. Type **SYSDBA**.

Password. Type **masterkey** or the currently assigned password. The password is case sensitive; it must be typed in small letters.

3. Click OK.
4. Select File>Database Connect

   The Connect To Database screen appears.



Provide the following information:

Database. Type the path and filename of the Personnel Director database you want to work with.

***Note**: All databases you create using Personnel Director Database Maintenance Module are located in the server directory where the VBTGLOBALDATA.GDB file is installed.*

5. Click OK.

To exit the server and InterBase Server Manager

- From the File menu, select Server logout
- From the File menu, select Exit.

Backing Up and Restoring a Database

Back up Personnel Director databases using your own scheduled backup software, using a schedule where the backup media is rotated every day. The backup program cannot be scheduled.

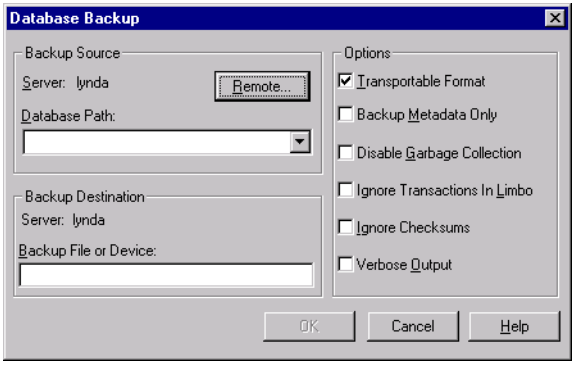
You can, however, improve performance by backing up and restoring a Personnel Director database using InterBase backup. The InterBase backup and restore removes unwanted space that is created when users insert and delete records.

To backup a database

The database being backed up is called the source. You can back up only one Personnel Director database at a time. The file or device to which the database is being backed up is called the destination or target.

1. To back up a database, select Tasks>Backup.

   Server Manager displays the Database Backup screen.



2. Provide the following information:

   Database Path. Server Manager displays the database to which Server Manager is currently connected. To choose another database, select it from the drop-down list or type it in the text field.

   Backup File or Device. Type the name of the destination file or device in the Backup File or Device field. Database files and backup files can have any name that is legal on the operating system; the .gdb and .gbk file extensions are InterBase conventions only.

If you specify a backup file that already exists, Server Manager overwrites it. To avoid overwriting, specify a unique name for the backup file.

Options. There a number of options you can set. Two of the more typical ones are listed below. For full details and instructions, refer to the InterBase manuals or online help.

- To copy the file to a machine with a different operating system, click the Transportable Format option.
- To exclude the data and save only the database metadata, click the Backup MetaData Only.

3. Click OK to start the backup.

   A standard text display screen opens to display status and any messages during the backup process.

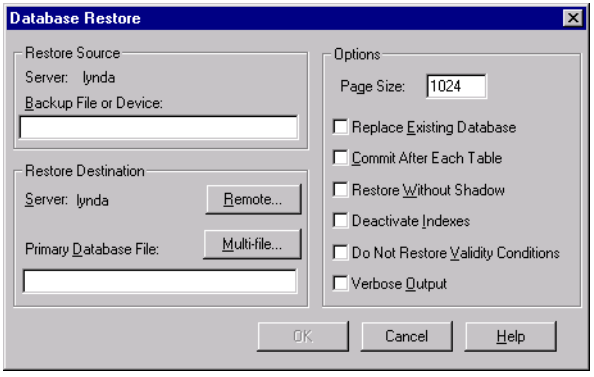
   A backup file typically occupies less space than the database because it includes only the current version of data and incurs less overhead for data storage. A backup file also does not contain index data structures, only the index definition.

To restore a database

In restore operations, the backup file from which the database is being restored is called the source. The database being restored is called the destination or target.

1. Select Tasks>Restore.

   The Database Restore screen appears.



Provide the following information:

Backup File or Device. Type the name of the source file or device.

Primary Database File. Type the name (including drive letter and directory path) of the database to restore to in the Primary Database File field. Note: You cannot restore a database to a networked file system (mapped drive).

Options. Provide the Page Size and specify any other options required. For full details and instructions, refer to the InterBase manuals or online help.

Page Size. Type the page size, 4096 bytes.

Replace Existing Database. Click this checkbox to restore the database you indicated in the Primary Database field.

2. Click OK to begin the restore.

   Typically, a restored database occupies less disk space than it did before being backed up, but disk space requirements could change if the on-disk structure version changes.

Validating and Repairing a Database

In day-to-day operation, a database can be sometimes subjected to events that pose minor problems to database structures. These events include:

- Abnormal termination of a database application. This does not affect the integrity of the database. When an application is canceled, committed data is preserved, and uncommitted changes are rolled back. If a data page for the uncommitted changes has already been assigned, the page might be considered an orphan page. Orphan pages are unassigned disk space that should be returned to free space.
- Write errors in the operating system or hardware. These usually create a problem with database integrity. Write errors can result in “broken” or “lost” data structures, such as a database page or index. These corrupt data structures can make committed data unrecoverable.

You should validate a database:

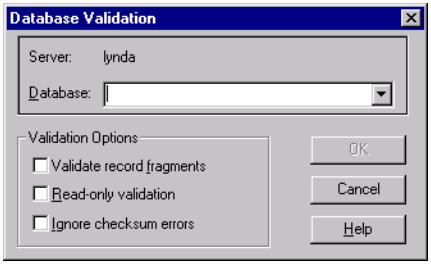
- Whenever a database backup is unsuccessful.
- Whenever an application receives a "corrupt database" error.
- Periodically, to monitor for corrupt data structures or misallocated space.
- Any time you suspect data corruption.

***Note**. Database validation requires exclusive access to the database. Shut down a database to acquire exclusive access. If you do not have exclusive access to the database, you get the error message:*

```
OBJECT database_name IS IN USE
```

1. Select Maintenance>Database Validation.

   The Database Validation screen appears.



   Provide the following information:

   Database. The name of the current database is displayed. Because there are some conditions such as a checksum error that make it impossible to connect to a database, it is not necessary to connect to the database before performing a validation. If Server Manager is not connected to the database, you can enter the desired database name in the Database text field or select it from the drop-down list.

   When Server Manager validates a database it verifies the integrity of data structures.

Specifically, it does the following:

- Report corrupt data structures
- Report misallocated data pages
- Return orphan pages to free space

Validation Options. For full details and instructions, refer to the InterBase manuals or online help.

Shutting Down and Restarting a Database

Maintaining a database often involves shutting it down. Only the SYSDBA or the owner of a database (the user who created it) may shut it down. The user who shut down the database then has exclusive access to the database.

Exclusive access to a database is required to:

- Validate and repair the database.
- Use the Screen Designer module.
- Restrict access when using Security Manager to change rights and permissions or Database Maintenance when importing data.

***Important Note**: ALL databases must be shutdown prior to using Personnel Director's Screen Designer; creating or deleting a database field modifies the database table in ALL Personnel Director databases.*

After a database is shut down, the database owner and SYSDBA is still able to connect to it, but any other user attempting to connect gets an error stating that the database is shut down.

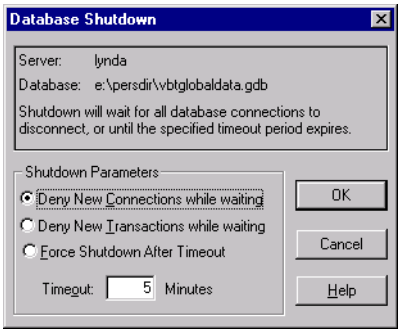
***Note**: Forcing database shutdown interferes with normal database operations, and should only be used after users have been given appropriate broadcast notification well in advance.*

After a database is shut down, it must be restarted (brought back online) before users can access it.

To shut down the database

1. Select Maintenance>Database Shutdown.

   The Database Shutdown screen appears.



   Provide the following information:

   Shutdown Parameters. You can specify the following shutdown options:

   Timeout period in minutes. Server Manager attempts to shut down the database during this period. Exactly how it does this depends on the other shutdown parameters.

   Deny new connections while waiting. This option allows all existing database connections to complete their operations unaffected. Server Manager shuts down the database after all processes disconnect from the database. At the end of the timeout period, if there are still active connections, then the database is not shut down.

   Deny new transactions while waiting. This option allows existing transactions to run to normal completion. Once transaction processing is complete, Server Manager shuts down the database. Denying new transactions also denies new database connections. At the end of the timeout period, if there are still active transactions, then the database is not shut down.

   Force Shutdown. With this option, there are no restrictions on database transactions or connections. As soon as there are no processes connections to the database, Server Manager shuts down the database. At the end of the timeout period, if there are still active connections, Server Manager rolls back any uncommitted transactions, disconnect any users, and shut down the database.

2. Click OK.

To restart a database

- Select Maintenance>Database Restart.

  The currently selected database is brought back online immediately.

Changing Personnel Director Servers

At some point, you may need to physically move Personnel Director data from one server to another. To do this:

1. Backup *all* databases on the source server. This includes all Personnel Director databases as well as the global database.
2. On the destination server, install InterBase Server software, then restore the backups you made in step 1 to this location.
3. On *one* client workstation, log into the Database Maintenance module, and use the Maintain Database List function to change the entries in Database List to match their new location. For instructions, see "Maintaining a List of Personnel Director Databases" on page 440.
4. On *each* client workstation, log into one of the Personnel Director programs and update the server settings to reflect the new path. For instructions, see "To update a server definition" on page 439.

***Note**: You maintain the location of the Personnel Director global database (*VBTGlobaldata.gdb*) using the Personnel Director Database Maintenance module's Maintain Database List function (recorded in the* SERVERS.TXT *file) on **each** client workstation. You maintain the location of the Personnel Director databases using the Personnel Director Database Maintenance module's Maintain Database List function (stored in the DATABASELIST table of the* VBTGlobaldata.gdb *file) on **one** client workstation and it is automatically updated on all other computers.*

20 LINKING PERSONNEL DIRECTOR TO PAYROLL DIRECTOR

You can link or share Personnel Director personnel and pay data with Payroll Director Paylink.

By linking to this payroll program, you eliminate re-keying of information in the payroll and Personnel Director programs.

This chapter explains how to install and configure the Paylink and what information is shared between Personnel Director and the payroll program.

Important Note: *To integrate with Working Time Tracker, you also need to install and configure the Working Time Tracker link.* *See chapter 20 "Linking Personnel Director to Working Time Tracker" on page 461.*

Installing the Payroll Link

Notes:

- If you are currently using Personnel Director or Payroll Director, exit these programs.
- Please ensure that you have successfully installed Personnel Director on your computer before attempting to install the Payroll Link.
- The Paylink program should be installed on all computers running Personnel Director. If the Paylink is not installed on a computer running Personnel Director, changes to the employee data in Personnel Director are not replicated in Payroll Director and the data will not be synchronised.

- The computer on which the Personnel Director and Paylink programs are installed must have full read/write access to the directory containing the Payroll Director databases files. If Payroll Director is run on a different computer than Personnel Director, the folder containing the Payroll Director database files must be shared with full read/write access.

To install the Payroll Link

1. Place the Personnel Director CD-ROM into the CD-ROM drive of the computer where you want to install the Paylink.
2. If the Personnel Director install program starts automatically, click the Cancel button.
3. Click the Start button on the Windows taskbar and select Run.
4. Type **x:\paylink.exe** where X is the drive letter of your CD-ROM drive, then click the OK button.

   The Installation Wizard will appear informing you to exit all programs before continuing with the installation. ***Please ensure that Personnel Director is not running on your computer.***
5. Click the Next button to continue.

   The installation program continues automatically. When the installation is complete, a message appears indicating successful installation.

Using the Payroll Director Paylink with Personnel Director

The Payroll Director Paylink is an add-on program for Personnel Director that must be installed from the Personnel Director installation CD.

The Paylink ensures that the employee and pay information stored in Personnel Director and Payroll Director is kept in synchronisation. When employee data is changed in either Personnel Director or Payroll Director, the the Paylink applies the changes to the other system.

The following information is shared between Personnel Director and Payroll Director:

Data	Direction of Data
Employee Details	Sent from both Personnel Director and Payroll Director
Pay Information	Sent only from Payroll Director to Personnel Director
Bank Details	Sent from both Personnel Director and Payroll Director

Employee Details can be modified in either Personnel Director or Payroll Director. Changing Employee Details in either system updates the other and keeps them both in synchronisation.

Pay Information is sent in one direction only, from Payroll Director to Personnel Director. Although changes can be made to Pay History within Personnel Director, they are not applied to Payroll Director. This is because Payroll Director requires more pay information than is stored on the Pay History screen in Personnel Director. Changes to employees' pay should therefore be made in Payroll Director only.

Bank Details can be modified in either system. The Paylink ensures that the other system is updated with the changes.

The following sections describe, in detail, how the Paylink functions and how data within the two systems is kept in synchronisation.

How the Payroll Director Paylink Works

In order for information in the Personnel Director and Payroll Director databases to be shared, a Personnel Director database must be mapped to a Payroll Director company. This mapping is created using the Payroll Link Settings dialog in Personnel Director.

Any changes made to an employee within a Personnel Director database are also applied to the employee in the corresponding Payroll Director company database. If no matching employee is found, a new employee record is created.

The same mapping is used to update employee data within Personnel Director when it is modified in Payroll Director.

Performing any of the following functions on Employee Details or Bank Details in Personnel Director immediately applies the change to the same employees in the corresponding Payroll Director company:

- Editing, inserting or deleting a record.
- Performing a Batch Update
- Performing a Global Update
- Importing Data using the Data Import Wizard

When data is modified in Payroll Director, a mark is set in the database to indicate that the data has been changed. The Paylink determines that data has been modified and applies the changes to the corresponding Personnel Director database. The Paylink checks for changes in Payroll Director when any of the following actions occur in Personnel Director:

- Logging into Personnel Director
- Opening any employee screen
- Prior to editing an Employee, Bank or Pay Record.
- Displaying or refreshing the Employee Navigator window.

If changes are found, they are applied to the Personnel Director database and the two systems are kept in synchronisation.

It is important to realize that Personnel Director must be running for changes to be sent to or received from Payroll Director. If changes are made to data held within Payroll Director and there are no users logged into Personnel Director, then those changes are not applied to the Personnel Director database until a user starts the Personnel Director application.

Sharing Pay Information

Pay information is passed from Payroll Director to Personnel Director. Any changes made to the Pay History within Personnel Director are ignored by the Paylink and are not sent to Payroll Director.

Personnel Director and Payroll Director differ in the way they store pay information for an employee. Personnel Director is a Human Resources system and stores information about an employee's basic rate of pay. It does not store detailed information about additions or deductions to that pay. A Pay History record is used to store the employee's basic rate of pay. If an employee's basic rate of pay or contractual hours changes, a new Pay History record is created to store this information.

Payroll Director, conversely, stores detailed pay information including any additions or deductions an employee may receive. The pay an employee receives can vary from pay period to pay period depending upon the additions or deductions. An employee may, for example, receive an additional payment for working a number of overtime hours. This information is recorded in Payroll Director, but does not appear in the Pay History screen in Personnel Director. If detailed, period by period pay information is required for an employee, you should use the Payroll Director system to retrieve this information.

The following process is used by the Paylink to retrieve an employee's basic pay from Payroll Director and import it into the Personnel Director Pay History screen:

1. The Paylink checks whether the employee is paid a salary on the Salary tab in Payroll Director. If a salary is specified, the period value is imported into the Personnel Director Pay History screen.
2. If no salary is specified, the Paylink checks the employee's pay rate information on the Rates tab in Payroll Director to determine which of the pay rates is the employee's basic pay rate. This is determined by checking a list of pay rates. (You must set this list up before using the Paylink. For more information, see "Configuring the Payroll Director Payroll Link" on page 476). Only a single rate of pay can be imported into Personnel Director, so the first matching basic pay rate is used.
3. The employee's pay period is read from the Pay Period field on the Period tab in Payroll Director.

4. Unless standard working hours have been specified for the employee, the default Company Working Hours Per Week are retrieved from Personnel Director and saved in the Contractual Hours field on the Pay History screen. If you wish to store specific standard hours for an employee you can do so using the Employee Extra Fields in Payroll Director. This is described in detail in the section "Defining Standard Working Hours for Individual Employees" on page 483.

Pay History records are only created in Personnel Director when one of the following pieces of pay information has been modified in Payroll Director:

- A change of basic rate or salary
- Change of standard working hours
- Change of Pay Period

Employee Numbers

You can specify the Employee Code format in Payroll Director for each payroll company. The Employee Code format can be numeric or text; if the format is numeric, the maximum number of digits can be from 2 to 10.

When using the Payroll Director Paylink in Personnel Director, entry of Staff Numbers and the exchange of data is controlled by the rules defined for the payroll company.

- If the Employee Code format is text, Personnel Director allows up to 10 alphanumeric characters for Staff Number. Any employee with more than 10 characters in the Staff Number field will not be transferred to Payroll Director.
- If the Employee Code format is numeric, the rules governing Staff Number values are slightly more complex. No leading zeros are allowed, only digits are allowed, and the number of digits defined is also enforced.

The following table gives examples of valid and invalid employee numbers where the Employee Code is numeric with maximum of 4 digits:

0123	This is invalid as it starts with a zero (zero padded).
123c	This is invalid as it contains non numeric characters (the letter 'c')
100	This is valid
2	This is valid
12	This is valid

Payroll Director employee numbers can only be four characters in length and cannot contain leading zeros.

***Note**: You cannot change the employee number when the payroll link is enabled.*

If you modify an employee record or synchronise employee information and the employee number is not valid, a warning message appears and the data is not transferred.

NI Number, Tax Code and Contribution Letter

The NI Number, Tax Code and Contribution Letter fields on the Employee Details screen in Personnel Director are validated to prevent invalid information being entered and passed to the payroll, where it may affect the pay an employee receives.

The validation is only enabled when the payroll link is enabled; disabling or nonstaining the link switches off the validation.

Deleting Employees and Changing Employee Numbers

Deleting an employee from Personnel Director will prompt you to set the date of leaving on the matching employee record in Payroll Director. Personnel Director cannot delete employee records from Payroll Director; this must be done manually by the payroll operator.

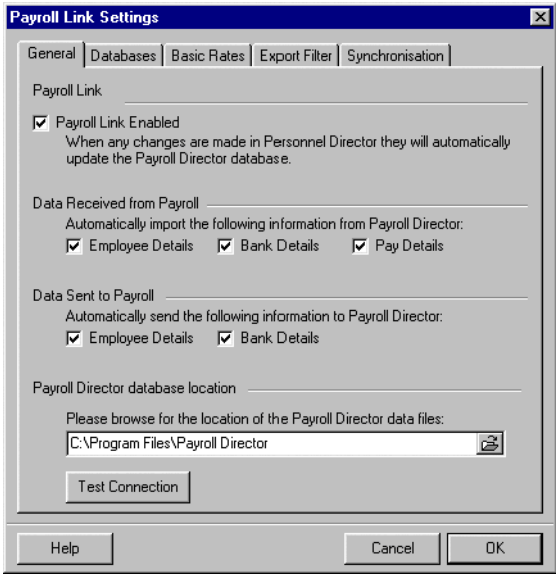
When using Payroll Director Paylink, records in Personnel Director and Payroll Director are linked by matching Staff Numbers (in Personnel Director) to Employee Codes (in Payroll Director). You cannot change Staff Numbers in

Personnel Director (this avoids breaking the connections). You can however, change Employee Codes in Payroll Director, but it is advisable to avoid doing this for reasons stated above. If you do change Employee Codes, records for individuals may be duplicated in the Personnel Director and/or Payroll Director databases.

Configuring the Payroll Director Payroll Link

Before you can start sharing data between Payroll Director Paylink and Personnel Director, you must configure the Payroll Link.

1. Start Personnel Director.
2. From the Options menu, select Payroll Link.



The Payroll Link Settings dialog is displayed.

***Note**: If you cannot see the Payroll Link menu option, you have not installed the Payroll Link correctly. Please refer to "Installing the Payroll Link" on page 469 for installation instructions.*

Enabling the Payroll Link

1. Select the General tab in the Payroll Link Settings dialog.
2. To enable the Payroll Link, select the Payroll Link Enabled checkbox. (You can also disable the link by clearing this checkbox.)

Specifying the Location of the Payroll Director Databases

For Personnel Director to communicate with Payroll Director Paylink, you must specify the location of the Payroll Director databases. To do this, complete the following steps.

1. Use the Directory-browsing button to select this location.
2. When you have selected the location of your Payroll Director databases, click the Test Connection button to test the connection between Personnel Director and Payroll Director Paylink.

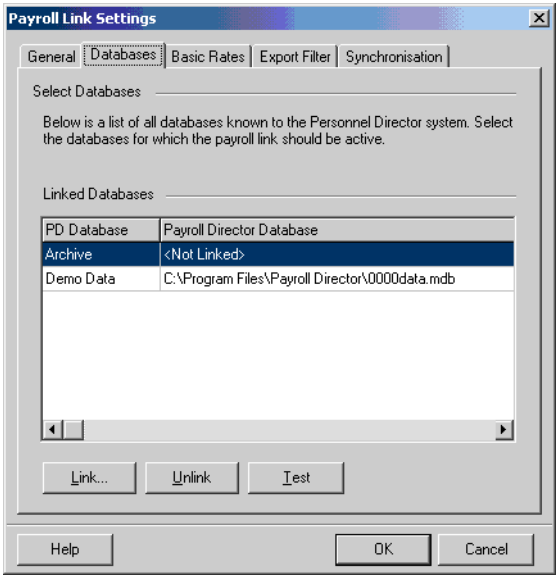
   If you are not sure of the location of your Payroll Director databases, contact your payroll administrator or search for the file 0000data.mdb using Explorer's Find Files or Folders.

Linking Personnel Director Databases to Payroll Director Companies

Next you specify which Personnel Director databases are linked to which Payroll Director companies.

1. Identify the file that corresponds to a Payroll Director Company:
   - In Payroll Director, open the Company to which you want to link.
   - Note the number in brackets in the title bar. For example, for the demonstration database, the display is: Payroll Director - (0) Riverside Hospital PLC. This means that the database file is 0000data.mdb. If it shows (2) the file is 0002data.mdb, and so on.

2. Select the Databases tab in the Payroll Link Settings dialog.

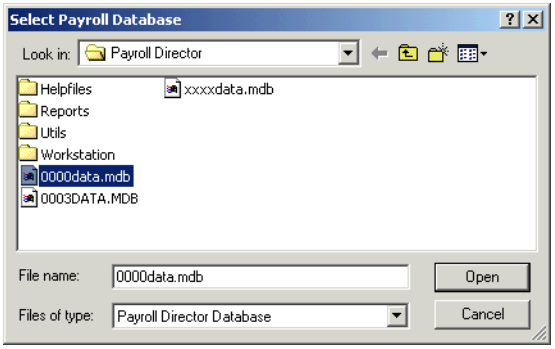


A list displays your Personnel Director databases on the left.

3. To connect a Personnel Director database to a Payroll Director Company, select the database from the list and then click the Link button.

***Note**: A Payroll Director Company can only be linked to a single Personnel Director database.*

A file selection dialog appears.



4. Select the Payroll Director Company file, as described in step 1, and click the Open button.

   If you do not see a list of Payroll Director databases, check that you have followed the Payroll Link installation instructions on page 469, enabled the link as described on page 477, and that you have created at least one Payroll Company within Payroll Director.

To prevent changes made to a Personnel Director database from being sent to a Payroll Director Company

- Select the required database from the list and click the Unlink button.

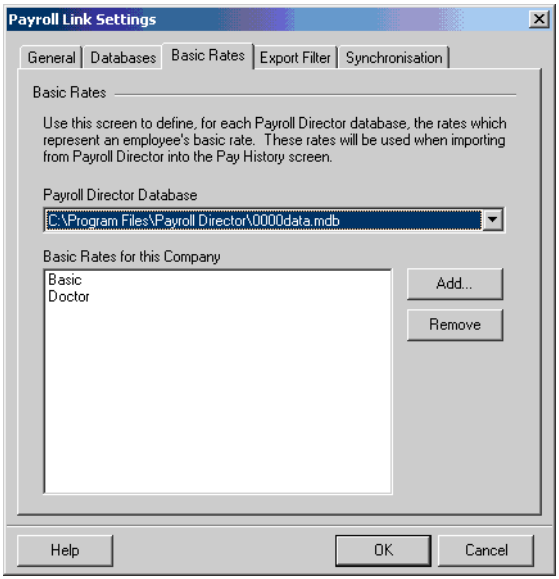
Defining Basic Rates of Pay

In order to import pay rates from Payroll Director into the Personnel Director Pay History screen, you must specify which rates of pay determine an employee's basic rate of pay.

For example, rates named Basic and Overtime may be specified within Payroll Director. The rate named Basic represents the basic rate of pay employees would normally receive and Overtime is the rate used to pay employees for a number of overtime hours worked. In this example, we want to import the pay rate named Basic and ignore the pay rate named Overtime.

To define basic rates of pay

1. Click the Basic Rates tab.



2. Select a Payroll Director company database from the drop down list.

   A list of all linked Payroll Director company databases is displayed. You must specify pay rates for each company database that you want to link to.

3. Click the Add button next to the list of rates. A list of available rates from the selected Payroll Director company database is displayed:

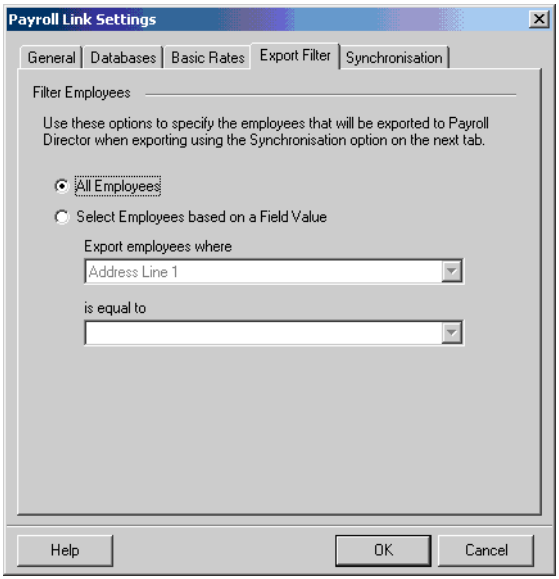
4. Select one or more rates that are used to define the employees' basic rate of pay and click the Select button.

5. To remove an item from the list of selected rates, click the 'Remove' button.

Filtering Employees Transferred from Personnel Director

Sometimes you may want to prevent changes to certain employee records being transferred to Payroll Director. You can do this using the Export Filter option, as shown below.

1. Select the Export Filter tab in the Payroll Link Settings dialog.



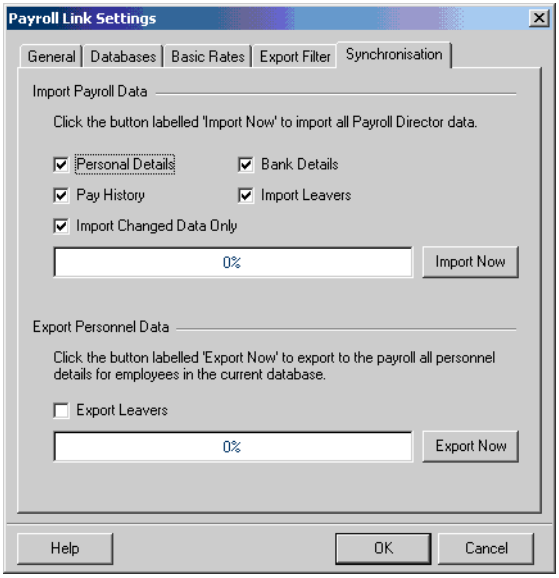
2. Take one of the following actions:
   - To transfer all employee records to Payroll Director, click the All Employees option.
   - To specify the records that you want to transfer to Payroll Director, select the Select Employees Based On A Field Value option. Then select the field to use as the filter from the Export Employees Where drop-down list. Then select a value from the Is Equal To drop-down list. Only employee records that match the filter are transferred.

   The filter is applied when using the Synchronisation option, described in the following section.
3. Click OK.

Synchronising Employee Information

Synchronisation is used to ensure the employee information contained in Payroll Director and Personnel Director match one another. Synchronisation is especially useful if you have recently purchased the Payroll Director program and want to populate it with employee information from Personnel Director.

1. Start Personnel Director and select the employee database that you wish to synchronise.
2. Select Options>Payroll Link. The Payroll Link Settings dialog is displayed.
3. Select the Synchronisation tab.



To synchronise Personnel Director by importing data from Payroll Director

1. Select the type of employee information that you would like to import from Payroll Director (Personal Details, Bank Details and Pay History).
   - To exclude employees who are marked as leavers within Payroll Director Payroll, ensure that the Import Leavers checkbox is clear before you start the import process.
   - If you only want to import data that has been changed since the last time you synchronised, ensure that the Import Changed Data Only checkbox is selected.
2. Click the Import Now button.

To synchronise Payroll Director by importing data from Personnel Director

1. Select the Export Leavers checkbox if you want to export employees who have a date of leaving in Personnel Director.
2. Click the Export Now button.

***Note**: When you export employees from Personnel Director to Payroll Director, the employees' Pay Period status is marked as Hold on the Period tab of the Employee Details screen. You need to verify the employee details in Payroll Director, then take the employees off Hold.*

Defining Standard Working Hours for Individual Employees

By default, the Payroll Link assumes that all employees work the same number of basic hours per week, as set by Company Working Hours per Week in Personnel Director. If some of your employees work a different number of basic hours, you can set their individual working hours per week using the Payroll Director application.

In Payroll Director, before setting the working hours for each employee, add the Standard Hours field using the Employee Extra Details screen.

To configure Employee Extra Details screen

1. In Payroll Director, close all open screens.
2. From the Company menu, select Configure Extra Employee Information.
3. Set the caption for the first field (Field 1 Name) to Standard Hours.
4. Set the Field 1 Type to Numeric.

To set the working hours per week for an individual

1. In Payroll Director, display the Employee Details screen for the employee you wish to modify.
2. Click the User-Defined button at the bottom of the screen.
3. Enter the default working hours per week for the employee in the first field on the first tab of the Employee Extra Details screen.

Shared Fields between Personnel Director and Payroll Director

Employee Details

The following information is shared between Personnel Director and Payroll Director and can be modified in either system.

Personnel Director Field	Payroll Director Fields
Employee Number	Employee Code
Title	Title
Marital Status	Status
Surname	Surname
First Name	Forename 1
Middle Name	Forename 2
Gender	Gender
Known As	Known As
Home Telephone	Phone No
Department	Department
Date of Birth	Date of Birth
Date Joined	Date Started
Date of Leaving	Date Left

Address	Address
Postcode	Postcode
Tax Code	Tax Code
NI Number	NI Number
Contribution Letter	NI Rate

Bank Details

The following bank information is shared between Personnel Director and Payroll Director and can be modified in either system.

Personnel Director Field	Payroll Director Fields
Name	Bank/Building Soc Name
Sort Code	Sort Code
Account Number	Account No
Branch Name	Bank Branch

Pay Details

Pay details are passed from Payroll Director to Personnel Director Pay History only.

The employees basic rate of pay is taken either from the salary information entered on the Salary tab in Payroll Director or, if no salary is specified, the Hourly Rates defined for the employee on the Rates tab. The pay period is read from the Pay Period field on the Period tab in Payroll Director.

If an hourly rate is read from Payroll Director, then the Pay Basis field within Personnel Director is set to Per Hour. If a salary value is read form Payroll Director, then the Pay and Pay Basis fields within Personnel Director (PD) are set as follows:

Payroll Director Pay Period	PD Pay Period	PD Pay Basis	PD Pay
Weekly	Weekly	Per Week	Payroll Director Period Pay
2 Weekly	2 Weekly	Per Week	Payroll Director Period Pay / 2
4 Weekly	4 Weekly	Per Week	Payroll Director Period Pay / 4
Monthly	Monthly	Per Month	Payroll Director Period Pay
Quarterly	Monthly	Per Month	Payroll Director Period Pay / 3

Notes:

1. SSPQUALIFYINGPATTERN defaults to 1 week. Monday to Friday are set as qualifying days for Statutory Sick Pay.
2. LASTPAID, LASTPAYRUN and PAIDUPTO relate to the pay period number and have values formatted as *yyynpp* where *yyyy* is the year (set to current year if exported), *n* is either 1 for monthly paid staff or 0 for weekly paid staff, and *pp* is the period number (set to 00 if exported for a new record).
3. ACTIVESTATUS, EMPLOYEESTATUS, NEWEMPLOYEE, CURRENTPAYMETHOD and INITIALSSPCURRENTWEEK are set to 1.

Troubleshooting the Payroll Link

You may need to verify and select the correct database driver for the Payroll Director Paylink as described below.

Error Message	Solution
"Cannot load an IDAPI service library. File C:\WINDOWS\MSAPPS\DAO\DAO3032.DLL Alias: VBTPaylink. error reported.	The incorrect database driver has been selected. Select the IDDA3532.DLL driver as explained in the following procedure.

Configuring the Payroll Link Database Driver

For the Payroll link to function correctly, certain settings need to be configured. The following steps explain how to set or check these settings.

1. From the Windows Control Panel, double-click the program icon labelled BDE Administrator.

   If you cannot see the program then:

   Select Start and Find, File or Folders from you windows task bar. Search for the named BDEADMIN.EXE. When the file is found, double click on it with your mouse.
2. In the BDE Administrator select the Configuration tab folder.
3. Click the + symbol to expand the Configuration list.
4. Click the + symbol to expand the Drivers list.
5. Click the + symbol to expand the Native list.
6. Select the driver named MSACCESS from the list.

   A list of settings for the driver appear on the right hand side of the screen.
7. The third item in the list is an option named DLL32. Ensure that this is set to IDDA3532.DLL.

   If it is not, then click on the drop down list for this setting and select IDDA3532.DLL from the list. If you cannot see IDDA3532.DLL on the list, ensure you have followed the installation instructions above and that you computer was restarted after the installation.

21 LINKING PERSONNEL DIRECTOR TO WORKING TIME TRACKER

The Personnel Director Working Time Tracker link is an add-on module for Personnel Director that is optionally installed after Personnel Director and Working Time Tracker have been installed.

Vizual Business Tools has developed the following software packages:

- Personnel Director – Human Resources Software
- Working Time Tracker – Time and Attendance Software
- Payroll Director – Payroll Software

Although each of these packages can be installed and operated independently, the link described in this chapter enables them to work together and share employee and pay information as if they were a single software package.

Whenever employee or pay information is changed in one system, the link ensures that the other systems are updated, keeping them in synchronisation. This synchronisation happens automatically during normal operation of Personnel Director and no user action is required.

Important Note: *To integrate with Payroll Director, you also need to install and configure the Payroll Director link.* *See chapter 20 "Linking Personnel Director to Payroll Director" on page 469.*

Installing the Working Time Tracker Link

Important Note 1:

Please ensure that the following are installed and functioning before installing the link:

- *Personnel Director*
- *Working Time Tracker Administrator*
- *Pervasive Database client*

You must be able to log into Personnel Director with no errors. You must also be able to log into Working Time Tracker and open the databases you want to share with Personnel Director.

***Important Note 2**: The link must be installed on each workstation running Personnel Director. Otherwise, any changes made to Personnel Director data on a workstation where the link is not installed will not be synchronised with data in Working Time Tracker and Payroll Director.*

To install the link

1. Insert the Personnel Director CD-ROM into the CD-ROM drive.
2. If the Personnel Director install program starts automatically, click the Cancel button.
3. Click the Start button on the Windows taskbar and select Run.
4. Type **x:\wttlinksetup.exe** where X is the drive letter of your CD-ROM drive, then click the OK button.

   The Installation Wizard starts and guides you through the rest of the installation process.

How the Link Works

Personnel Director checks both Working Time Tracker and Payroll Director to see if employee or pay information has been modified. If it has, the changes are imported into Personnel Director. Personnel Director then updates the other system (Payroll Director if the changes originated in Working Time Tracker and vice versa if the changes originated in Payroll Director).

Personnel Director performs the import from Working Time Tracker and Payroll Director in the following order:

1. Imports changes from Working Time Tracker.
2. Updates Payroll Director with changes from Working Time Tracker.
3. Imports changes from Payroll Director.
4. Updates Working Time Tracker with changes from Payroll Director.

Therefore, if the same employee has been modified in Working Time Tracker and Payroll Director, the changes made in Payroll Director are overwritten by those made in Working Time Tracker. It is therefore recommended that changes to employee details are made in either Working Time Tracker or Personnel Director.

Personnel Director checks for changes in Working Time Tracker and Payroll Director when any of the following events occur:

- Logging into Personnel Director.
- Displaying or refreshing the Employee Navigator.
- Opening an employee screen.
- Prior to editing an employee record.
- Refreshing the data on an employee screen.

This ensures that the data in Personnel Director is kept synchronised with changes made in Working Time Tracker and Personnel Director.

Any changes made in Personnel Director are immediately applied to both Working Time Tracker and Payroll Director.

Important Note: *You do not see changes made in Working Time Tracker or Payroll Director reflected in Personnel Director unless one of the events listed above has occurred. During normal operation of Personnel Director these events occur regularly.*

To verify that information has been imported into Personnel Director, click the Refresh button on the Employee Navigator or open an employee screen.

Information is only passed between Working Time Tracker and Payroll Director when Personnel Director is running.

Working Time Tracker and Payroll Director Integration

If Payroll Director, Working Time Tracker and the associated links are installed, Working Time Tracker is used to drive payroll information in Payroll Director.

As employees clock in and out of work, work records are created. These work records record the amount of time an employee has worked and hence the pay they should receive that week. Changes to work records are detected by Personnel Director and it, in turn, updates weekly pay information in Payroll Director.

It is important to understand that payroll information is only passed between Working Time Tracker and Payroll Director for weekly paid employees. Pay information for all other employees is passed from the Pay History in Personnel Director to Payroll Director. The Payment Cycle field in Working Time Tracker is used to indicate if an employee is weekly paid.

Employee Numbers

For employee information to be shared between Working Time Tracker and Personnel Director, the Employee Number field must be numeric and cannot contain alphabetic characters. If you modify an employee in Personnel Director and the Employee Number is not numeric, Working Time Tracker will not be synchronised with the changes. (No error message is displayed.)

When the Working Time Tracker link is enabled, you cannot change Employee Numbers in Personnel Director. This is because it is not possible to change an employee's Clock Number once it has been set in Working Time Tracker.

Deleting Employees

When you delete an employee in Personnel Director, the employee is not deleted from Working Time Tracker. However, their date of leaving is set to the current date and the reason for leaving is set to 'Employee deleted from Personnel Director.'

You can, if you wish, start Working Time Tracker and permanently delete the employee from the Working Time Tracker database.

Global Updates, Batch Inputs and the New Employee Wizard

Any changes you make to employee details or pay information using the Global Update, Batch Input or New Employee Wizard are automatically sent to Working Time Tracker and Payroll Director to ensure that the data is kept synchronised.

Data Import

If you import data into Personnel Director, you should use the Synchronisation option in the Working Time Tracker Link Options dialog to send the imported data to Working Time Tracker. If you have the Payroll Link installed, then you should also run the Synchronisation option in the Payroll Link options dialog.

Information Shared

Employee Information

The following employee information is shared between Personnel Director, Working Time Tracker and Payroll Director.

Personnel Director Field	Working Time Tracker Field	Payroll Director Field
Address	Address	Address
Department or Cost Code*	Cost Centre	—
Department	—	Department
Date of Birth	Date of Birth	Date of Birth
Date Joined	Date Joined	Date Started
Date Left	Date Left	Date Left
First Name, Middle Name	First Names	Forename 1, Forename 2
Night Worker indicator	Night Worker indicator	Not Linked
Employee Number	Clock Number	Employee Code
Gender	Gender	Gender
Surname	Surname	Surname
Home Telephone	Telephone	Phone No

Swipe Card Id**	Swipe Card Id	Not Linked
Marital Status	Not Linked	Marital Status
Known As	Not Linked	Known As
NI Number	Not Linked	NI Number
Contribution Letter	Not Linked	NI Rate
Tax Code	Not Linked	Tax Code
Title	Not Linked	Title

* Either the Department or Cost Code field can be linked in Personnel Director. This is specified in the WTT Link Options dialog (see page 495).

** Swipe Card Id is a new field added to the Personnel Director employee details table when the Working Time Tracker link is installed. By default it is not displayed on the screen, but you can display it by creating a field for it using the Screen Designer.

Pay Information

If the Working Time Tracker link is installed but the Payroll Director link is not, the employees' pay rate, expressed as pence per minute, and pay frequency are passed between Working Time Tracker and Payroll Director. Deselecting the Send Pence Per Minute from Personnel Director to WTT option in the WTT Link Options dialog disables this exchange.

If the Payroll Director link is also installed, the following pay information is shared:

Between Personnel Director & Working Time Tracker

Rate of pay expressed as pence per minute and pay frequency.

Between Working Time Tracker & Payroll Director

Weekly pay calculated from work records for Weekly paid employees only.

Between Personnel Director & Payroll Director

Pay period and pay per period for employees that are not weekly paid (weekly pay is sent from Working Time Tracker). In addition, bank details are also passed between Personnel Director and Payroll Director.

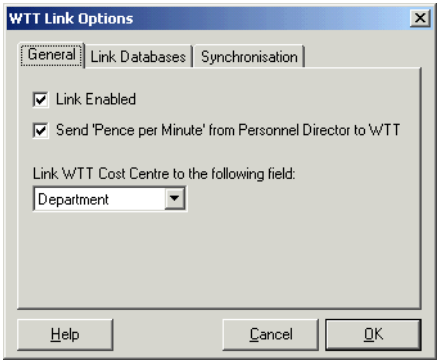
Configuring the Link

When the Working Time Tracker link is installed, an option called WTT Link appears on the Personnel Director Options menu.

Note: *Displaying the WTT Link Options dialog closes any active employee windows that you have open.*

1. From the Personnel Director Options menu, select WTT Link.

   The WTT Link Options dialog, where you configure the link, appears.



2. Set options as described below and click OK when you are finished.

Enabling the Link and Setting General Options

- Set General options as follows.

  Link Enabled: Use this option to switch on and off the link to Working Time Tracker. When the option is checked, you cannot edit employee numbers and employee and pay data is shared with Working Time Tracker.

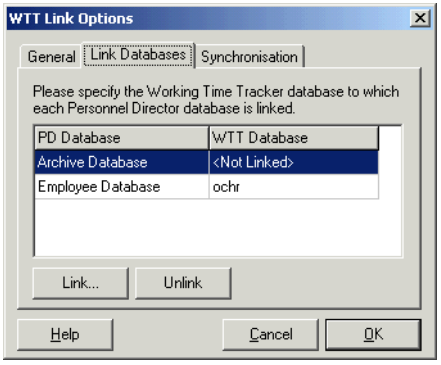
  Send 'Pence per Minute' from Personnel Director to WTT: When this option is selected, Personnel Director calculates how much an employee earns per minute from their current pay record and sends the figure to Working Time Tracker. The pence per minute figure is used in the Work Records in Working Time Tracker to calculate how much an employee earns per week. If the Payroll Link is enabled, the earnings per week are sent to the payroll.

Link WTT Cost Centre to the Following Field: This determines which Personnel Director field links to the Cost Centre field in Working Time Tracker. The default is the Department field, but you can select the Cost Code field if you wish.

Linking the Databases

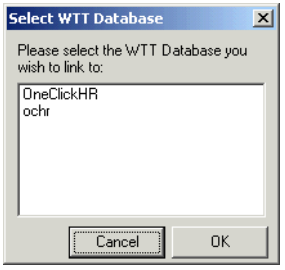
Next you link Personnel Director databases to Working Time Tracker databases. Personnel Director exchanges employee information with the Working Time Tracker database linked to the database in which the employee is located.

1. Click the Link Databases tab.



A list displays your Personnel Director databases on the left.

2. To connect a Personnel Director database to a Working Time Tracker database, select the database from the list and then click the Link button.



3. Select the Working Time Tracker database to link to from the list and click OK.

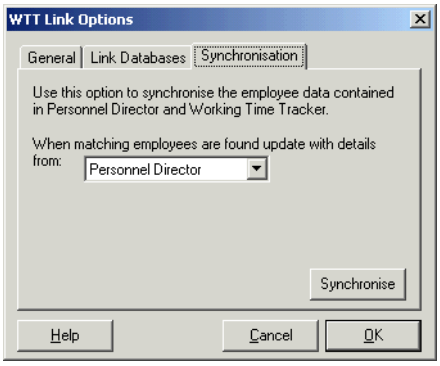
Synchronising Employee Information

This option is used to synchronise the employee information contained in Personnel Director and Working Time Tracker. Synchronisation is performed for the currently open database. To synchronise other databases, you need to open them from the File menu.

The synchronisation option is useful to initially populate the Personnel Director or Working Time Tracker databases or to update information after you import data into Personnel Director.

Note: *Changes made to the Personnel Director or Working Time Tracker databases during synchronisation are not sent to Payroll Director. To synchronise with Payroll Director, you must run the payroll synchronisation separately. See "Synchronising Employee Information" on page 482.*

1. Click the Synchronisation tab.



2. Select the database you want to use to perform updates when matching employees are found in both databases.

   Synchronisation is performed in the following order:

   1. Employees that are found in the Personnel Director database but not found in the linked Working Time Tracker database are created in the Working Time Tracker database.

2. Matching employees (employees found both in Personnel Director and Working Time Tracker) are updated with details from the system specified in the drop down list.
3. Employees that are found in Working Time Tracker but not found in Personnel Director are created in the Personnel Director database.

4. Click the Synchronise button.

The Log File

If changes in Personnel Director cannot be sent to Working Time Tracker because a connection could not be established, the changes are written to a temporary database. When a connection becomes available, Personnel Director writes the changes in the temporary database to Working Time Tracker.

This ensures that the two systems are kept in synchronisation, even when a connection to Working Time Tracker cannot be established.

22 SCHEDULING REPORTS

Use Report Scheduler to automatically create Personnel Director reports on a scheduled basis and email the reports to selected recipients. The reports are saved as PDF files in an archive that you can use to monitor report distribution. You can modify, copy, and delete scheduled reports and view, delete, email, and purge archived reports if you are authorised to do so.

***Important Note**: Not all versions of Personnel Director include Report Scheduler. For more information, contact your Alliance Partner or Vizual Business Tools.*

Installing and Setting Up Report Scheduler

This section contains installation and setup instructions on how to:

- Install Report Scheduler on InterBase.
- Grant users access to Report Scheduler in the Security module.
- Configure Report Scheduler to connect to the Personnel Director database and use the Service Indicator to select and start the Report Scheduler Engine.

System Requirements

Use the following table to ensure that you have the required hardware and software for the server, workstations, and network where you are running Report Scheduler.

Server	The Report Scheduler runs on the Interbase version of Personnel Director on one of the following operating systems: • Windows 95/98 • Windows NT4 Server (Service Pack 4 and above) • Windows 2000 Server Minimum recommended hardware is: Pentium II 233, 128MB RAM
Client	Report Scheduler runs on an IBM compatible PC running one of the following operating systems with Personnel Director and MS Outlook 2000 installed and configured (any machine that can run Personnel Director with MS Outlook 2000). Microsoft Windows 95/98 Microsoft Windows NT Microsoft Windows 2000 Microsoft Windows XP Personnel Director: Minimum Specification: Pentium P133, 32MB RAM Recommended Specification: Pentium P200, 64MB RAM
Network Protocols	Network protocols should be MS-Net compatible for Multi-user versions. For example, TCP\IP, IPX\SPX
Email	MS Outlook 2000 needs to be installed on the machine running the Personnel Director and Report Scheduler.

Installing Report Scheduler

Install Report Scheduler as follows, then complete the procedures in the next two sections, “Setting Up Security” and “Configuring Report Scheduler” on page 505. You can then start and log in to Report Scheduler.

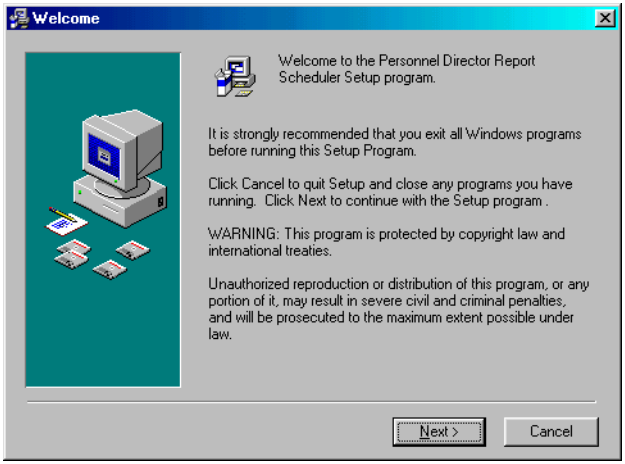
Pre-requisites For Installing Report Scheduler

- Personnel Director should be installed and operational.
- MS Outlook 2000 should be installed and configured.
- Backup should be performed using the Database Maintenance module of Personnel Director.

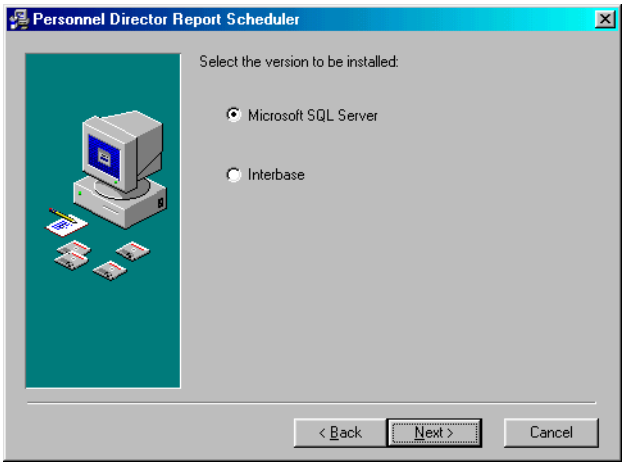
To install Report Scheduler:

1. Place the Report Scheduler CD-ROM into the CD-ROM drive of the workstation where you want to install Report Scheduler.
2. The Setup program should start automatically. If it does not, follow these instructions to start the Setup program.
   - Click the Start button on the Taskbar.
   - Select Run from the popup menu.

     Type **x:\setup.exe** where X is the drive letter of your CD-ROM drive, and then click the OK button.


Welcome
Welcome to the Personnel Director Report Scheduler Setup program.
It is strongly recommended that you exit all Windows programs before running this Setup Program.
Click Cancel to quit Setup and close any programs you have running. Click Next to continue with the Setup program .
WARNING: This program is protected by copyright law and international treaties.
Unauthorized reproduction or distribution of this program, or any portion of it, may result in severe civil and criminal penalties, and will be prosecuted to the maximum extent possible under law.
Next >
Cancel

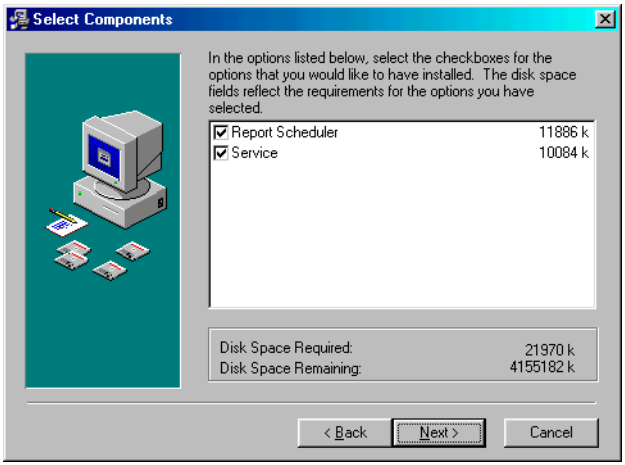
3. Select the version you want to install.



- To install Interbase version of Report Scheduler, select Interbase.

Note: A message appears if the version of Personnel Director installed is prior to 3.2.0.5, and the installation of Report Scheduler will terminate.

4. Click Next until the Select Component screen appears.


Select Components
In the options listed below, select the checkboxes for the options that you would like to have installed. The disk space fields reflect the requirements for the options you have selected.
Report Scheduler 11886 k
Service 10084 k
Disk Space Required: 21970 k
Disk Space Remaining: 4155182 k
< Back
Next >
Cancel

To accept the default component selection, click Next

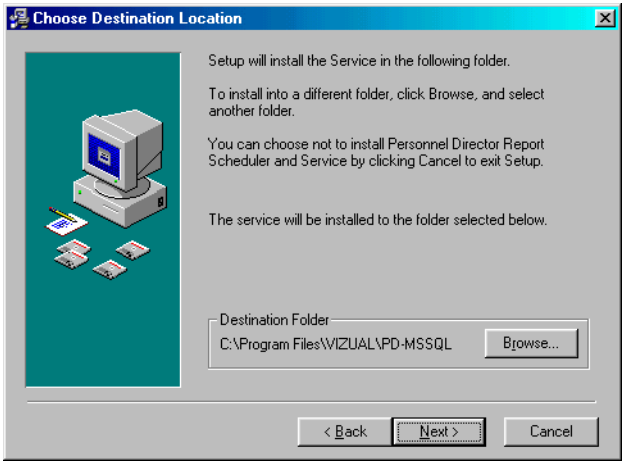
-or-

Clear the checkbox of component(s) you do not want to install and click Next.

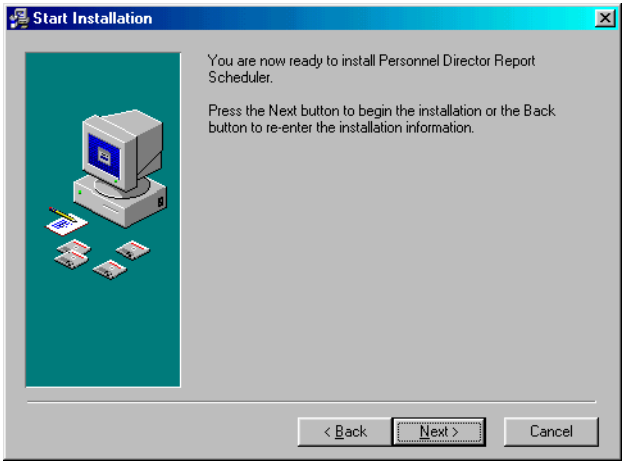
Note: *If you choose to install both the Report Scheduler and the Service, Setup next asks for the installation location for the service. If you choose to install only the Report Scheduler, Setup proceeds to Start Installation screen.*

5. If you chose to install the Service component, select the destination folder where the Service component is to be installed.

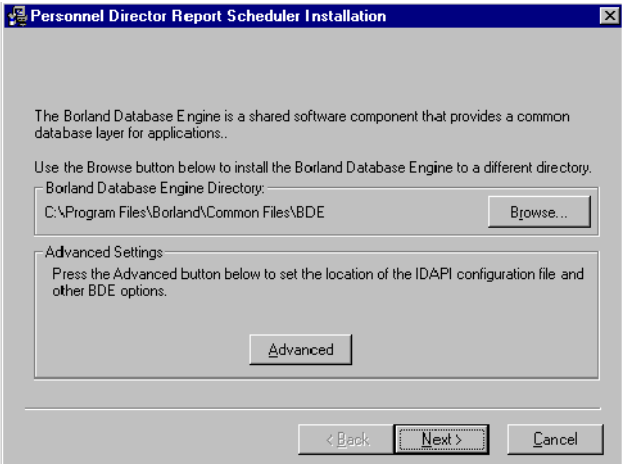
   Note: *Only the Service component will be installed in this destination folder. The Report Scheduler will be installed in the Personnel Director folder.*


Choose Destination Location
Setup will install the Service in the following folder.
To install into a different folder, click Browse, and select another folder.
You can choose not to install Personnel Director Report Scheduler and Service by clicking Cancel to exit Setup.
The service will be installed to the folder selected below.
Destination Folder
C:\Program Files\VIZUAL\PD-MSSQL
Browse...
< Back
Next >
Cancel

6. To start the installation click the Next button.

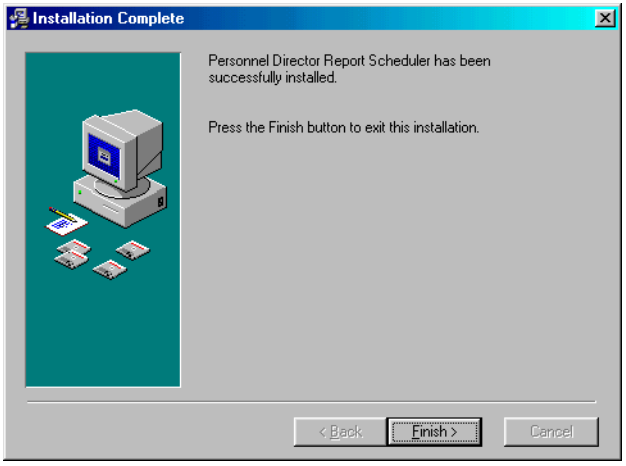

Start Installation
You are now ready to install Personnel Director Report Scheduler.
Press the Next button to begin the installation or the Back button to re-enter the installation information.
< Back
Next >
Cancel

7. During the installation, Setup will install the Borland Database Engine. If BDE is already installed in the machine, the Setup will skip the installation of BDE and proceed to the next screen.


Personnel Director Report Scheduler Installation
The Borland Database Engine is a shared software component that provides a common database layer for applications..
Use the Browse button below to install the Borland Database Engine to a different directory.
Borland Database Engine Directory:
C:\Program Files\Borland\Common Files\BDE
Browse...
Advanced Settings
Press the Advanced button below to set the location of the IDAPI configuration file and other BDE options.
Advanced
< Back
Next >
Cancel

8. Click the Browse button to change the directory and then click the Next button, or click the Next button to accept the default directory. You can also use the Advanced button to configure the Borland Database Engine.

   When the files are copied, the Report Scheduler Setup Completed screen appears.


Installation Complete
Personnel Director Report Scheduler has been successfully installed.
Press the Finish button to exit this installation.
< Back
Finish >
Cancel

9. Click Finish.

Configuring Report Scheduler

The following section contains instructions on how to configure Report Scheduler to connect to the Personnel Director database and use the Service indicator to select and start the Report Scheduler Engine.

Configuring Report Scheduler to Connect to the Personnel Director Database

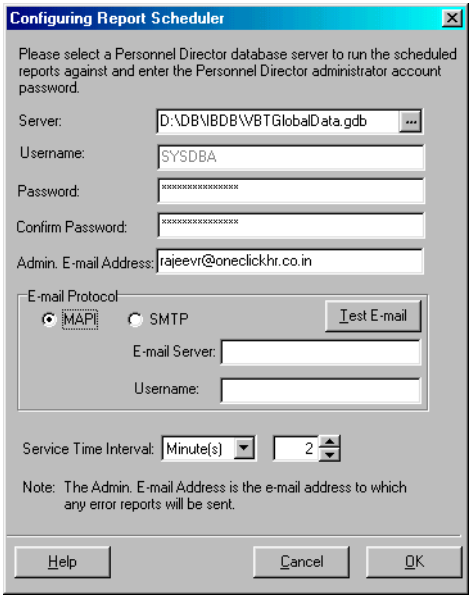
To connect Report Scheduler to the Personnel Director database, you must:

- Configure Report Scheduler to connect to the Personnel Director global database.
- Provide the email address of the Administrator who will receive mail about reports that could not be delivered due to invalid email addresses.

***Important Note**: You must configure Report Scheduler before using the service indicator, setting up security, or logging into Report Scheduler itself.*

To configure Report Scheduler:

1. From the Start menu select Programs>Vizual Business Tools>Personnel Director>Configuration Utility.



2. Enter the following information to configure the Report Scheduler:

   Server: Enter the server and database location of the VBTGlobaldata database used by Personnel Director. For Interbase, this is the full path to the database, including the drive, directory, and filename.

   For example, if the databases are located in c:\databases and the server name is Testsrv1, enter Testsrv1:c:\databases\vbtglobaldata.gdb

   Username: The user name for the Personnel Director administrator. The default is SYSDBA. This cannot be changed.

   Password: Enter the password for the user SYSDBA. The default password is masterkey.

   Confirm Password: Enter the same password again to confirm.

   Admin. Email Address: Enter the email address of the Administrator. Errors in sending the reports through mail due to invalid email addresses are sent to this address.

3. Set the Email Protocol and Service Time Interval options.

   Email Protocol: Select the email protocol your mail server supports.

   If you select the MAPI option, a MAPI compliant email client should be installed in the system where the Service is running. If you select the SMTP option, specify the email server name and username and password (if required for the SMTP mail server). Please contact your System Administrator for more information about configuring the email protocol.

   Click the Test Email button to send a test mail using the protocol selected. This ensures that the email functionality works.

   Service Time Interval: Select the time interval for the Service to generate the scheduled Reports. By default, the interval is set to 15 minutes. The interval can be set in minutes as well as hours.

   Note: *If you change to the settings in Configuration Utility, you must restart the service.*

4. Click the OK button to save the configuration or the Cancel button to exit without saving the changes.

Using the Service Indicator

Prior to scheduling reports, you must launch the scheduling service. When the service is running, you can then manage the service by pausing, stopping, or starting/continuing the service. When required, you can also cancel or terminate the service.

When the service is running, one of the following indicators appear in the System Tray.

Indicator	Meaning
	The service is running
	The service is paused
	The service is stopped

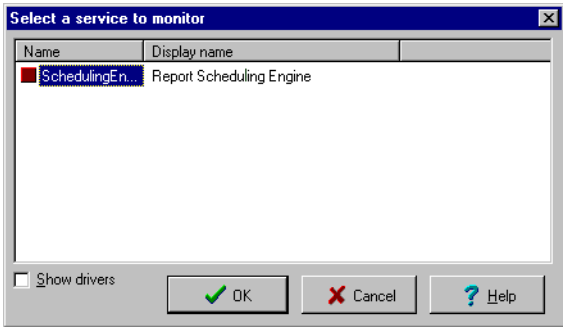
Scheduled reports are mailed to users only if the Service Indicator is running.

To launch the scheduling service:

Note: If the Service is running on a Windows 2000 server or Windows NT server, ensure that it is started using a Domain Administrator account. This can be done using the StartUp options of the service.

1. From the Start menu, select Programs>Vizual Business Tools>Personnel Director>Service Indicator.

   The Select a Service to Monitor screen displays the list of services.



2. Select the SchedulingEngine.
3. Click the OK button. Click the OK button again.

To manage the scheduling service:

1. From the System Tray, right-click the Report Scheduling Engine and select one of the following from the menu:

- To start the scheduling service, select Start/Continue Service.

- To pause the scheduling service, select Pause Service.

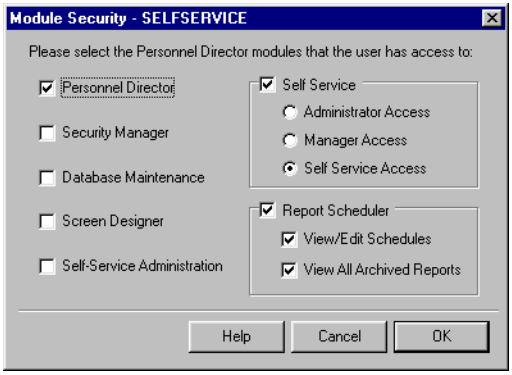
- To stop the scheduling service, select Stop Service.
- To cancel or terminate the service, select Exit.

Setting Up Security

Log in to the Security Manager module to set up user access to Report Scheduler. (For login instructions, see the *Personnel Director User's Guide*.)

1. Select the user whose security access is to be changed.

2. Click the Module Security button or select Security>Modules.



3. Click the Report Scheduler checkbox and then click OK.

   This provides access to Report Scheduler to the selected user.

   - To grant access to view or edit a schedule, click the View/Edit Schedules checkbox. If this option is not checked, the user cannot view or edit the report schedules.
   - To grant access to view all archived reports, click the View All Archived Reports checkbox. This enables the user to view all the archived reports. If this option is not checked, the user can view only the archived reports that contain the logged in user's email address.

***NOTE:** A user's ability to view or edit scheduled or archived reports depends on the security settings selected on this screen.*

4. Select User>Exit to exit the Security Manager module.

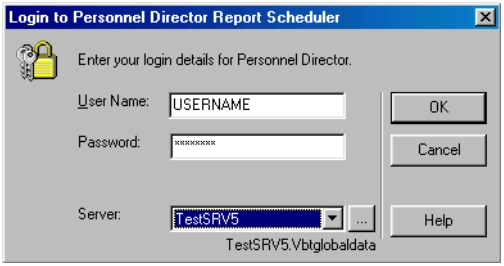
Starting Report Scheduler and Logging In

1. From the Start menu select Programs>Vizual Business Tools> Personnel Director>Report Scheduler.

   -or-

   Double-click the Report Scheduler icon on the Desktop.

   The Report Scheduler login screen appears.



2. Provide the following information:

   Username: Enter the User ID you set in the Security Manager or use the default USERNAME.

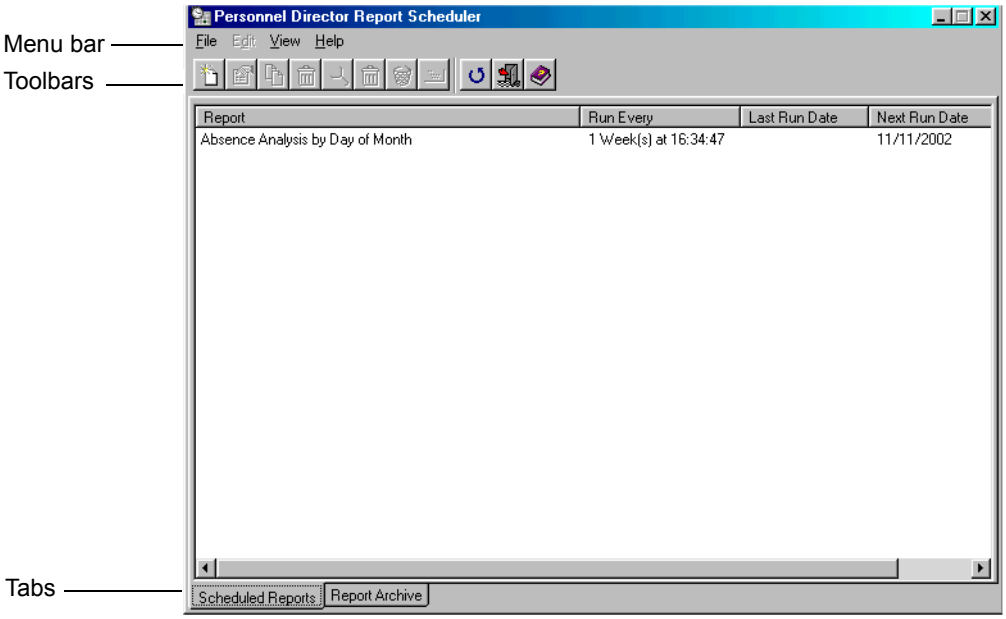
   Password: Enter the password for the selected username. If you entered USERNAME, the default password is password.

   Server: Select the server running the Personnel Director database that you want to use.

3. Click OK.

Learning to Use Report Scheduler

When you start the Report Scheduler, the main window appears. It contains a menu bar and a toolbar.



This window is the starting point for accessing all of the functions in Report Scheduler. This section describes the components that you see on the main window and how to use them.

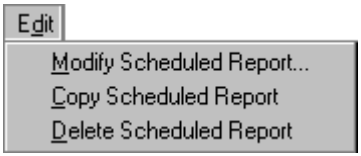
On the top of the window are the menus and toolbars. You can schedule a new report, modify an existing report, or copy a report.

At the bottom of the screen are two tabs. The first one is the Scheduled Reports tab and the other one is the Report Archive tab. Toggle between these two tabs to perform relevant operations.

The Main Menu

The main menu, near the top of the window, is called the menu bar.

Each word or group of words on a menu provides access to another menu of related functions. When you click a word on a menu, a drop-down list appears, showing the menu associated with that word. For example, when you click Edit, the Edit menu is displayed.



When you click an item listed on the menu, you can either perform the task described by that item, or go to another screen to perform the task there.

Menus Available from the Main Menu

The following menus are available from the main menu:

File menu: Contains functions related to creating new reports and closing Report Scheduler.

Edit menu: Contains functions related to modifying or copying or deleting a scheduled report.

View menu: Toggles between the Scheduled Report tab and the Archived Report tab.

Help menu: Contains online help for Report Scheduler. The About option on this menu is where your software version number is displayed.

The Toolbars

Just below the menu bar are the toolbars. There are three toolbars: the Report toolbar that you use to create, modify, copy, and delete new reports, the Archive toolbar that you use to preview, delete, and purge archived reports, and the Help toolbar you use to view context-sensitive Help or exit Report Scheduler.

The Toolbars

Report Toolbar

The Report toolbar has buttons you use to work with scheduled reports.

Button	Menu Access	Description	Procedure	Shortcut
	File menu New Scheduled Report	Create a new scheduled report	"Scheduling a Report" on page 513	Alt+F+N
	Edit menu Modify Scheduled Report	Modify a scheduled report	"Modifying a Report Schedule" on page 517	Alt+D+M
	Edit menu> Copy Scheduled Report	Create a copy of the original scheduled report	"Creating a Copy of a Scheduled Report" on page 517	Alt+D+C
	Edit menu> Delete Scheduled Report	Delete a scheduled report	"Deleting a Scheduled Report" on page 518	Alt+D+D

Archive Toolbar

The Archive toolbar has buttons you use to work with archived reports.

Button	Menu Access	Description	Procedure	Shortcut
		Preview an archived report	"Previewing an Archived Report" on page 518	
		Delete an archived report	"Deleting an Archived Report" on page 519	
		Purge an archived report	"Purging Archived Reports" on page 519	
		Email an archived report	"Emailing Archived Reports" on page 519	

Help Toolbar

The Help toolbar has buttons you use to refresh report lists, access online Help about Report Scheduler and exit the application.

Button	Menu Access	Description	Procedure	Shortcut
		Refresh Scheduled Reports and Archive Reports lists		
	Help menu> Contents	View Contents for online Help		Alt+F+X
	File menu Exit	Exit Report Scheduler		Alt+H+C

Working With Personnel Director Reports

Use Report Scheduler to run Personnel Director reports automatically at predetermined dates that you specify. Report Scheduler then emails these reports to recipients you identify and saves the report preview to an archive. The report archive contains a copy of each report that you generate in Report Scheduler.

Working With Scheduled Reports

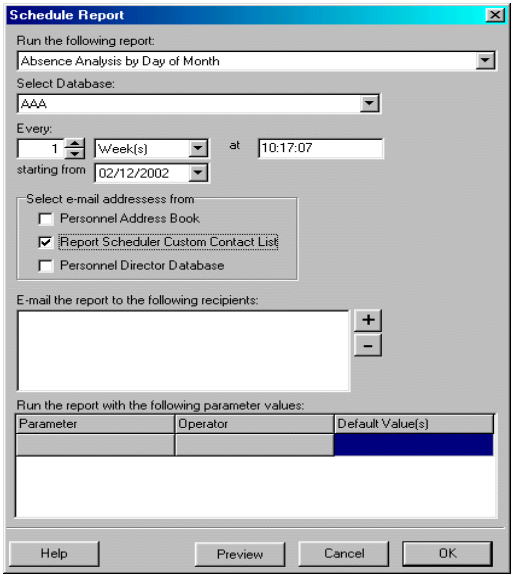
This section shows how to schedule Personnel Director reports. If required, you can then modify, copy or delete a report schedule.

Scheduling a Report

Select the report you want to create a schedule for and specify its frequency, email recipients, the Personnel Director database to be used and the source of the email addresses.

To create a schedule for a report:

1. On the Reports toolbar, click the New Scheduled Report button.



2. Select a report from the list of reports available from the Run The Following Report drop-down list. A list of all available Report Builder reports defined within Personnel Director is displayed.

   ***Tip**: Press the Tab key to move to the next field.*

3. Select the frequency for generating the report and the start date.

   ***Important:** The time must be later than the current date and time. If the Starting From date is today, then the time must be later than the current time. If the Starting From date is after today, the time can be any valid time.*

4. Choose a database from the list of databases available from Select Database drop-down list. A list of all available databases in Personnel Director is displayed.

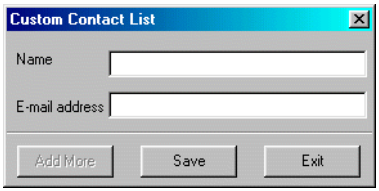
5. Under Select E-mail Addresses From, select the source of the email addresses:

   - Select Personnel Address Book to select the e-mail addresses from the Personnel Address Book of your default email client.

- Select Report Scheduler Custom Contact List to enter email addresses manually, or select email addresses from a previously entered list.
- Select Personnel Director Database to select the email addresses from your Personnel Director database.

***Note**: You must choose a Select E-mail Addresses From option to enable the + selection button next to the recipients list.*

6. Click the **+** button. The Select Names screen loads. This may take a few minutes, depending on the number of names in the list.
7. Take one of the following actions:
   - If you selected Personnel Address Book, go to step 8.
   - If you selected Personnel Director Database, the Select Database list shows the databases available in Personnel Director. Select the database, and then select names as described in step 8.
   - If you selected the Report Scheduler Custom Contact List, click the Custom Contacts button and enter the following:

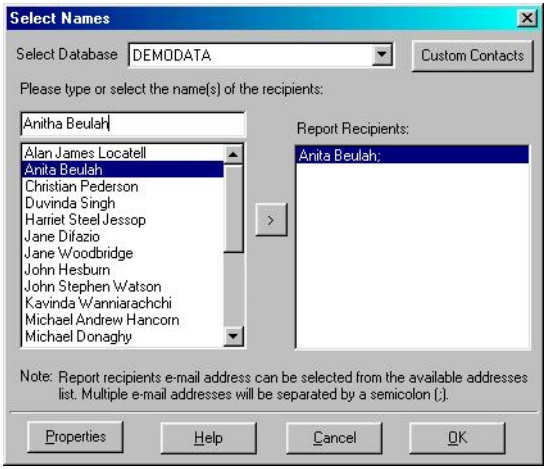


Name: Name to display in the Select Names list.

E-mail address: Email address for the contact.

   - Click the Save button to save changes, or Add More to add more email addresses.
8. Select at least one email recipient. This is a mandatory field.

- To select the names, use the > button.



- To view the name and email address of the selected recipient, click the Properties button.
- If you selected the Report Scheduler Custom Contact List option on the Scheduled Reports screen, the Custom Contacts button appears. To enter email addresses manually, click the Custom Contacts button and enter the email address information.
- If you selected the Personnel Director Database option on the Schedule Reports screen, select database that contains the addresses you need from the Select Database drop-down list.
- When you are finished, click OK.

9. Click the Preview button to preview the report. You can also print the report from the Preview window.
10. To set selection criteria, use the grid at the bottom of the screen. When you choose a report that contains selection criteria, the grid is automatically filled with a list of parameters defined in the report. You can change the default values and enter a valid value for each report parameter. These parameters are applied to the report when it is scheduled to run.
11. Click the OK button to schedule the report.

Modifying a Report Schedule

You can change the report schedule settings to obtain different results and to change email recipients. For example, you can change the Department setting from Administration to Information Technology so that the scheduled report generates IT instead of Administration statistics.

You can modify only the following options:

- Frequency of the scheduled report
- The database from which the report is generated
- The list of recipients
- Parameter values

To modify a report schedule:

1. From the selection list, select the report to modify.
2. Click the Modify button on the toolbar or select Edit>Modify Scheduled Report.
3. Modify the required fields and click the OK button. The original scheduled report is replaced by the modified scheduled report.

Creating a Copy of a Scheduled Report

Creating a copy of a scheduled report is useful for running the same report at the same scheduled time, but with different settings. For example, you want to run a report for the Sales department, then for Engineering. The copied report is given the same name as the existing report but is assigned a numerical suffix to ensure the name is unique. You can also rename the copied report.

To create a copy of a scheduled report:

1. From the selection list, select the report to copy.
2. Click the Copy button on the toolbar or choose Edit>Copy Scheduled Report

   The report is copied and is assigned the same name as the original report with a numbered suffix.

Deleting a Scheduled Report

When a scheduled report is no longer required, you can delete it.

To delete a scheduled report:

1. From the selection list, select the report to delete.
2. Click the Delete button on the toolbar or choose Edit>Delete Scheduled Report.
3. To confirm the deletion, click Yes; to cancel the deletion, click No.

Working With Archived Reports

When a report is generated, its report preview is saved to an archive. The report archive contains a copy of each report that is created in Report Scheduler.

This section shows how to preview, email, delete and purge archived reports.

Previewing an Archived Report

From time to time you may want to view a scheduled report that was archived.

To preview an archived report:

1. Click the Report Archive tab.
2. From the selection list, select the report to preview.
3. Click the Preview button on the toolbar.

   A preview of the report is displayed. Note that you can print the report from this screen.

Emailing Archived Reports

You can email one or more archived reports.

To email one or more archived reports:

1. Click the Report Archive tab.
2. From the selection list, select one or more archived reports to email.
3. Click the Email Selected Archive Reports button on the toolbar.

   The MS Outlook 2000's Email Compose window appears with the reports you selected as attachments.
4. Add the required email address, the message, then click the Send button.

Deleting an Archived Report

When an archived scheduled report is no longer being used, you can delete it.

To delete an archived report:

1. Click the Report Archive tab.
2. From the selection list, select the archived report to delete.
3. Click the Delete button on the toolbar.
4. To confirm the deletion, click Yes; to cancel the deletion, click No.

Purging Archived Reports

***Warning**: Purging archived reports permanently deletes the reports; proceed with caution.*

To purge an archived report:

1. Click the Report Archive tab.
2. Click the Purge button on the toolbar.
3. Select the date. Archive Reports that were created on or before the date you select will be removed permanently.
4. To confirm the purge, click Yes; to cancel the purge, click No.

23 USING THE SCREEN DESIGNER

Use Personnel Director's Screen Designer to:

- Add new tabs, information boxes, and fields to an existing Personnel Director screens.
- Change information boxes, labels, and appearance of existing Personnel Director fields.
- Create new screens specially customised for your organisation.
- Create customised help for your Personnel Director users.

You can also use the Screen Designer to:

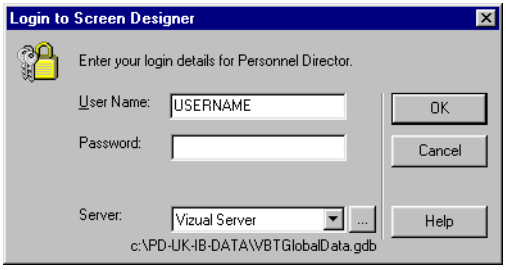
- Modify existing Personnel Director screen prints (print records).
- Create screen print layouts for the new screens you create.

Starting the Screen Designer Module

***Important Note**: ALL databases must be shutdown prior to using Personnel Director's Screen Designer; creating or deleting a database field modifies the database table in ALL Personnel Director databases. See "Shutting Down and Restarting a Database" on page 465.*

1. From the Start menu, select
   Programs>Vizual Business Tools>Personnel Director>Screen Designer

   The Screen Designer Login screen appears.



2. Provide your user name, password and the server where the Personnel Director database you want to use is located. For further instructions, see "Starting Personnel Director and Logging In" on page 32. For further instructions, see "Starting Personnel Director and Logging In" on page 32.
3. Click OK.

   The Screen Designer screen appears.

To exit the Screen Designer

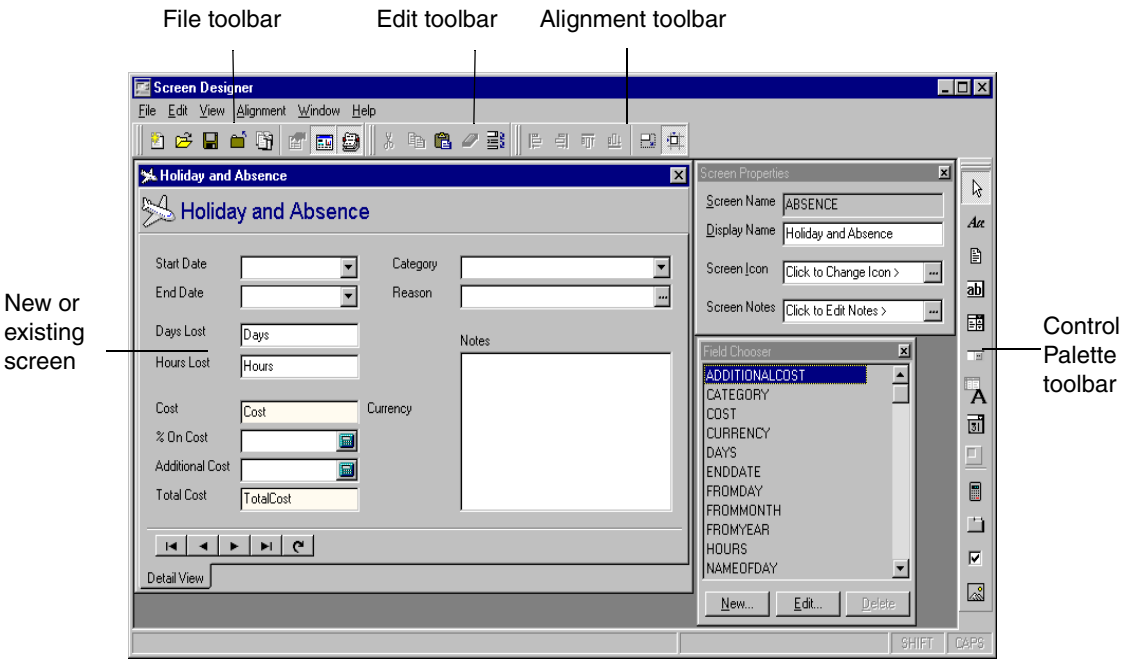
- From the File menu, select Exit.

Designing Screens

Read the following section to learn how to modify existing Personnel Director screens or create one yourself.

About the Screen Designer Window

When you create a new screen or open an existing screen with Screen Designer, the following window appears.



In addition to the File, Edit, Alignment, and Control Palette toolbars, the associated Screen Properties, and Field Chooser dialogs also appear.

For examples of how to use Screen Designer, see “Examples” on page 527. For more information about adding or changing screens, see “Working with Screens” on page 546. For more information about adding or changing fields, see “Working with Fields” on page 556.

The File Toolbar

Click the buttons on the File toolbar to manage screens you are creating or updating.

	Create a new screen.
	Open an existing screen.
	Save changes to the current screen.
	Close the current screen.
	Close all screens currently open in the Screen Designer.
	Display or change control properties of the selected object on the current screen.
	Display or change the properties of the current screen.
	Display, add, change or remove fields associated with the current screen.

The Edit Toolbar

Use the buttons on the Edit toolbar to change controls displayed on the current screen.

	Cut the selected object and copy it to the clipboard.
	Copy the selected object to the clipboard.

	Paste the object in the clipboard.
	Delete the selected object.
	Display or change the order of the tab key order in the selected screen.

The Control Palette Toolbar

Click the following buttons on the Control Palette toolbar, then click on the screen where they are to be placed. You can add:

- Date, text, and, numeric data entry fields.
- Interactive controls, such as checkboxes and Pick Lists.
- Display controls, such as labels, lines, boxes, frames, information boxes, and tabs.

	None. Click to deselect the current control. Use this button to release the control to do other tasks, such as repositioning labels and fields.
	Click to create a label control for a field.
	Click to create a note field control. This control is typically associated with a field where a user enters unlimited data; for example, comments and descriptions.
	Click to create a text field control. This control is associated with a field where a user enters alphanumeric data.
	Click to create a fixed Pick List field control. This is a control associated with a field where a user selects pre-defined items from a list.
	Click to create a variable Pick List field control. This is a control associated with a field where a user selects pre-defined items from a list, adds new items to the list when required or removes items from the list when no longer used.

	Click to create a database label control. Use database controls to display values in fields. You can only display fields defined for the current screen.
	Click to create a date field control. This is a control associated with a field where the user either types the date or selects the date from a drop-down calendar.
	Click to create 3-D effect lines, boxes, and empty areas (spaces).
	Click to create a numeric field control. This is a control associated with a field where the user has the option of using a calculator to enter a figure.
	Click to create a tab control.
	Click to create a checkbox control. This is a control where the user either marks or clears the checkbox. It is typically associated with a field used for logical (yes/no or on/off) data.
	Click to create a frame for a image to be stored and displayed. Images must be bitmap images (.BMP).

The Alignment Toolbar

Use the buttons on the Alignment toolbar to line up two or more controls on the current screen. Additional buttons are used for changing the size of a selected control and for turning grid snap on or off.

	Align selected objects to the top of the highest object
	Align selected objects to the right of the right-most object.
.	Align selected objects to the left of the left-most object.

	Align selected objects to the bottom of the lowest object.
	Display or change the size of the selected object.
	Enable or disable the snap grid used for aligning objects.

Examples

This section presents three examples for you to follow:

- Making changes to a Personnel Director screen.
- Creating a new screen (basic).
- Creating a new screen (advanced).

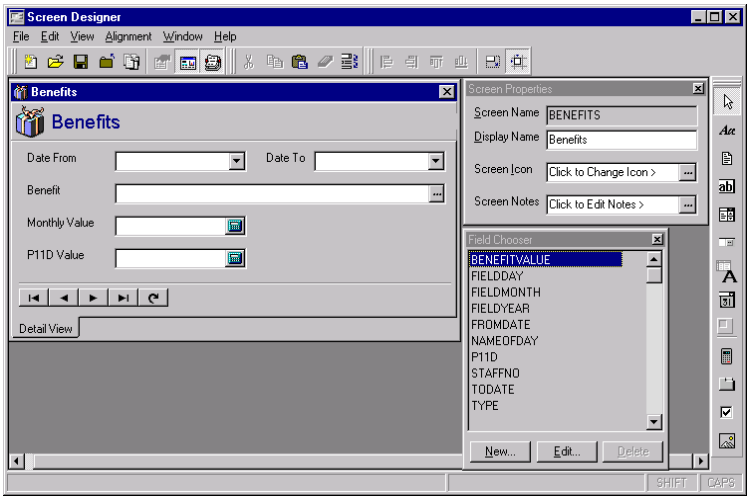
Example 1: Making Changes to a Personnel Director Screen

While recording employee benefits, you decide that you need an area to record extra information—for example, some notes. With Screen Designer, you can quickly achieve this simply by adding a new field to the Benefits screen. This will enable you to store the information you need.

Follow these instructions for adding the field.

1. Open the Benefits screen.

- Click the Open button on the Screen Designer toolbar.
- Select Benefits from the Table list and click OK.



Notice that this is the same version of the screen you use to enter information. There are also two additional screens, Screen Properties and Field Chooser.

2. First, create a new field to store the data in.

- From the Field Chooser, click the New button.

  The Field Properties box appears on the screen.

For this example we want to create a new field to store notes. To do this:

- In the Field Name box, type **Notes**.

You now need to tell the database what type of information you want to store in it; in this example, storing notes.

- From the Type drop-down list, select Notes.

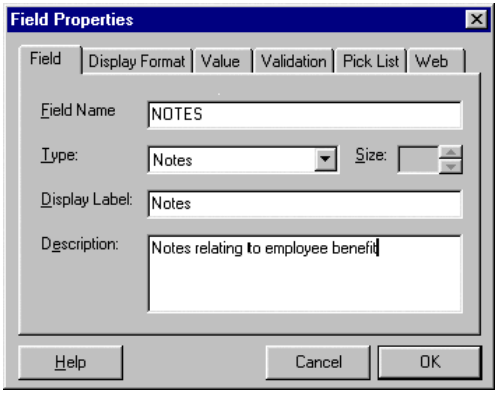
Next, enter the display label. This is the label you will see by the side of the box on screen.

- In the Display Label box, type **Notes**.

Finally you need to enter a description of what this field is to be used for.

- In the Description box, type **Notes relating to employee benefit**.

The Field Properties screen should look similar to this.

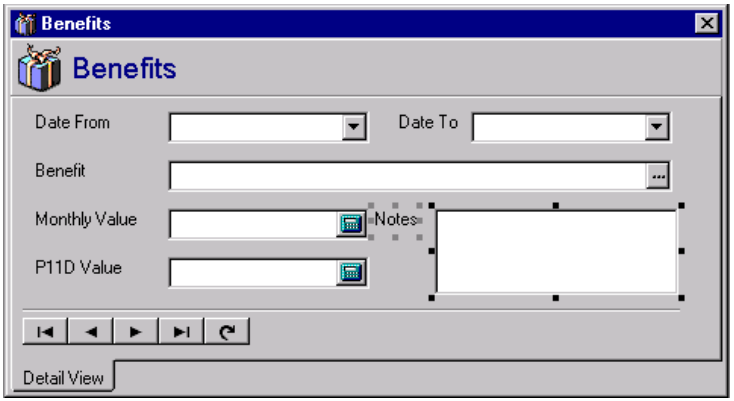


- To save the new field, click OK.

  The field you just added now appears in the Field Chooser screen.

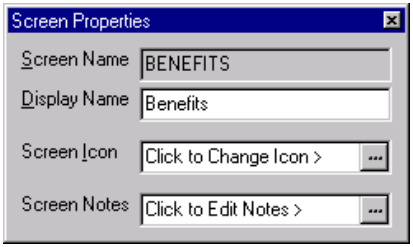
3. Adjust the size of the Benefits screen by dragging the lower right corner to the right. Next, adjust the size of the notes box by selecting the box by clicking it and then dragging the bottom line up.
4. The next step is to locate this new field on the screen.

   - From the Field Chooser screen, select Notes (the field you just created), drag it onto the form and move it to a position under the date. (You may need to use the scroll bar to find the field).



5. Now that you added the field, you want to provide instructions on when and how to use it for your users. To do this, you create a screen note. Screen Notes are a handy way to provide additional help for your users.

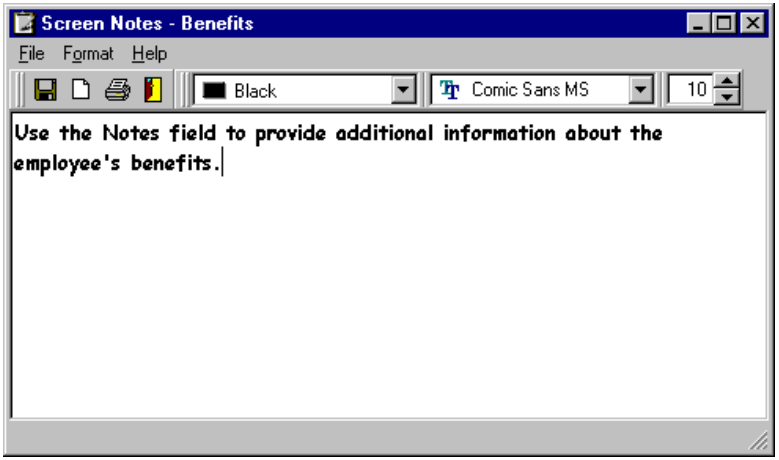
- Click the Screen Properties button, if the Screen Properties is not already displayed.



- Click the Screen Notes Pick List.

  The Screen Notes editor appears.

- Replace the text on the screen with **Use the Notes field to provide additional information about the employee's benefits**.

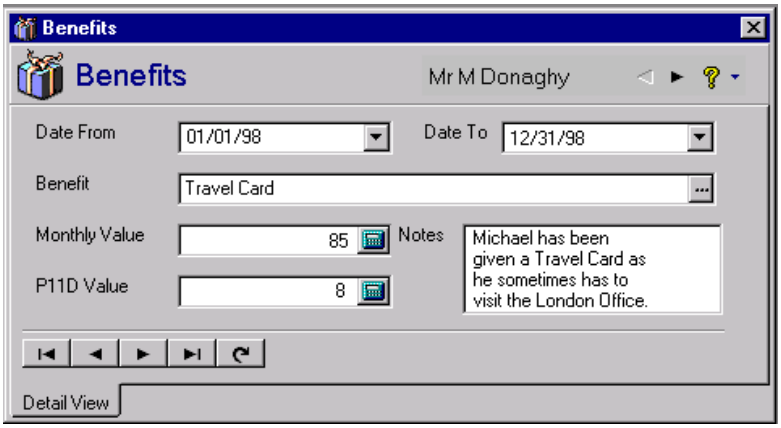

Screen Notes - Benefits
File Format Help
Black
Comic Sans MS
10
Use the Notes field to provide additional information about the employee's benefits.

- Click the Save button on the Screen Notes toolbar.
- To exit Screen Notes, select Exit from the File menu.

6. You have now successfully modified the benefit screen. Check the result.

- To save your changed Benefits screen, click the Save button on the File toolbar.

- Exit Screen Designer. Select Exit from the File menu.
- Restart Personnel Director.
- Open the benefit screen and you will be able to enter information in the new field that has just been added.



Example 2: Creating a New Screen (Basic)

You decide there is a need to keep a log of staff uniforms and their associated date for replacement. As Personnel Director is currently set up, there is no place to record this information. You can do this by creating a new screen for Personnel Director.

To add a screen, follow these instructions:

1. Create the new screen.

- Click the New button on the Screen Designer toolbar.

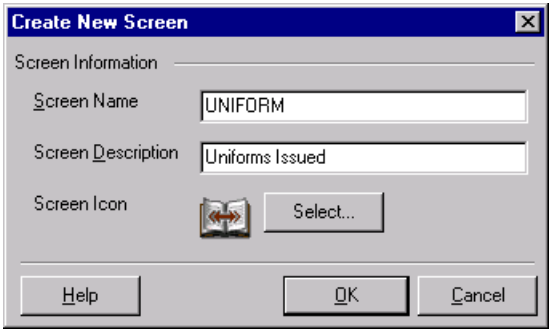
  The Create New Screen screen appears.
- Provide the following information:

  Screen Name: Type **Uniform**.

  Screen Description: Type **Uniforms Issued**.

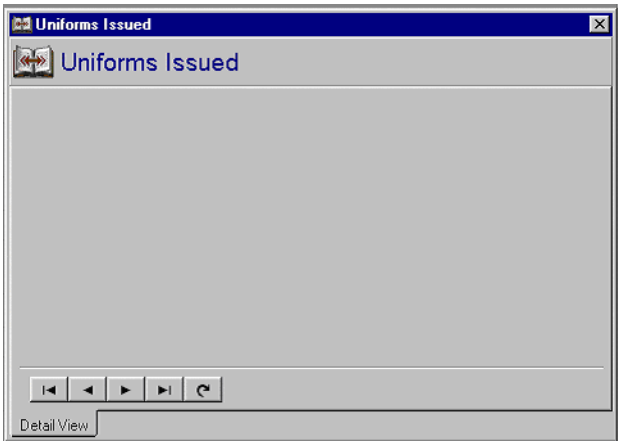
  Screen Icon: Click the Select button, choose an appropriate icon, and click Open.

The screen should look similar to this.



- To create the screen, click OK.

Screen Designer creates a blank screen for you.



Notice the Field Chooser box displayed on the screen. Note that there is a field that is automatically created: StaffNo. You cannot delete this field; it is needed to link with other screens and generate reports.

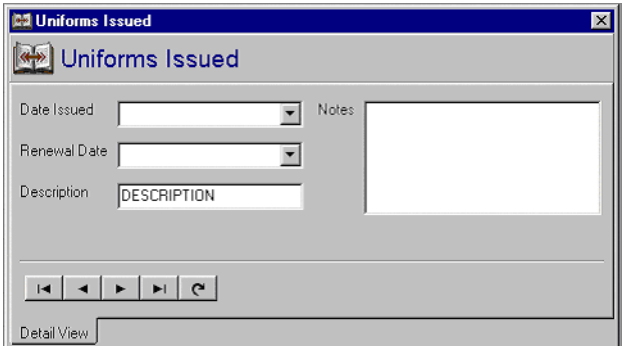
2. The next step is to create the fields for storing the required information.
   - On the Field Chooser screen, click the New button, specify the field properties, and click OK. Do this four times, once for each field.

Field Name	Type/Size	Display Label	Description
IssuedDate	Type: Date	Date Issued	Date the uniform was issued
RenewalDate	Type: Date	Renewal Date	Date the uniform is to be replaced
Description	Type: Text Size: 30	Description	Description of the uniform
Notes	Type: Notes	Notes	Any notes you may want to make on the uniform

   Note: The names for a field can contain letters A to Z (upper or lower case), numerals 1 to 9, but can have no spaces.

3. The next step is to add the new fields you created to the form by dragging them from the Field Chooser to the form.

   The result should look something like this.



4. The new form is now complete. Check the results.
   - Save the screen, exit Screen Designer, and start Personnel Director.
   - Just click the icon you chose that appears in the Personnel Director shortcut bar. You can now enter information into your new screen.

Example 3: Creating and Editing a New Screen (Advanced)

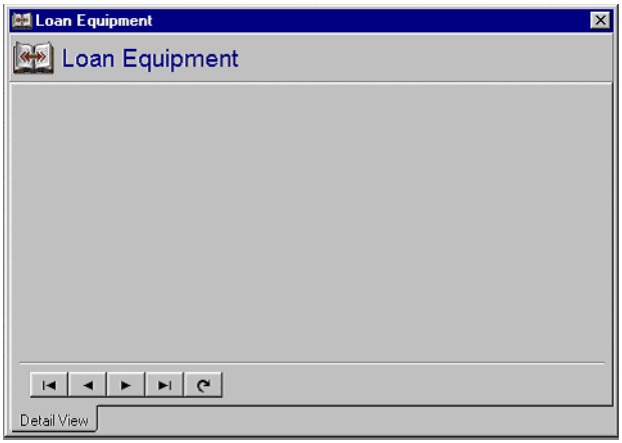
In this example, you want to create a Loan Equipment screen to track equipment people borrow from the company.

To add the screen, follow these instructions:

1. Create a new screen.

   - Click the New button on the Screen Designer toolbar.
   - Add the Loan Equipment screen information and click OK.

   A blank screen appears.



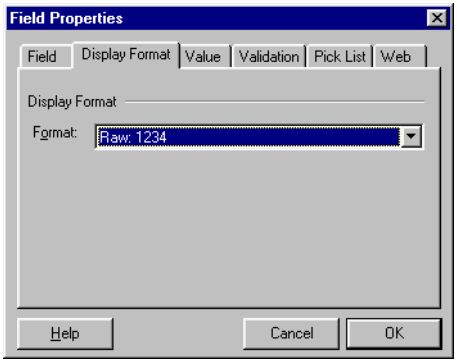
2. Create the fields for the data to be saved into.

   The names for a field can contain letters A to Z (upper or lower case), numerals 1 to 9, but can have no spaces.

- There are four fields to be added.

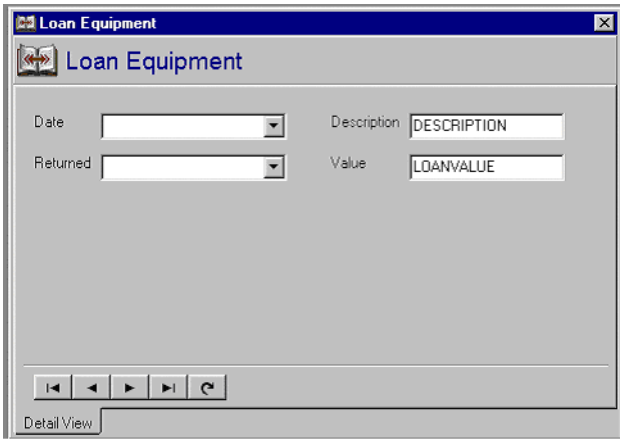
Field Name	Field Type/Size	Display Label	Description
LoanOutDate	Type: Date	Date	Date equipment was loaned out
Returned	Type: Date	Returned	Date equipment is to be returned
Description	Type: Text Size: 30	Description	Description of equipment
LoanValue	Type: Decimal Number	Value	Value of the equipment

3. The EquipmentValue field is to have two decimal places.
   - On the Field Chooser screen, double-click Value then click the Edit button.
   - Click the Display Format tab.



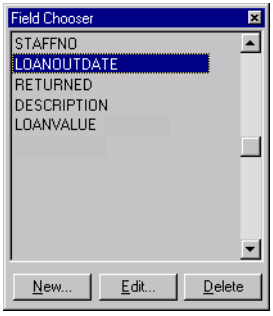
   - Select 2 Decimal places from the format drop-down.
   - Click OK.
4. Drag the fields from the Field Chooser to the form in the locations you want them to be.

When you are done, your screen should look similar to this.



5. Now is a good time to set the properties for each item; for example, the dates. Do this using the Field Chooser.

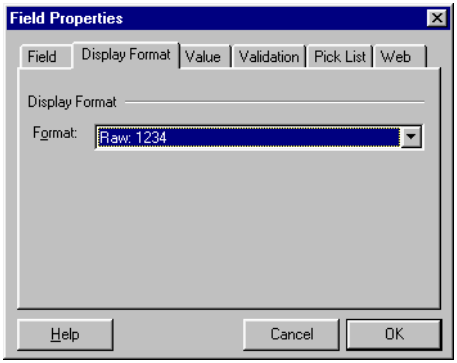
   - Select LoanOutDate in the Field Chooser and click the Edit button.



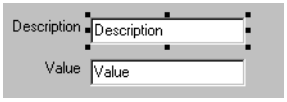
   The Field Properties screen displays the current properties of the field.

   - Click the Display Format tab. Select the type of date you require from the Format drop-down list.
   - When you have done this, click on the OK button.

- Repeat step 4 for the Returned field.



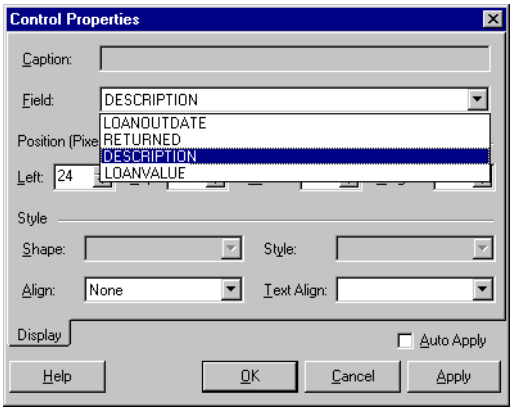
6. Change the Description field so that users can choose from a Pick List instead of using the default field box. To do this you must first delete the Description default field box. You decide to replace the box with a Variable Pick List (one where the user can add an item if it is not in the list) instead of a Fixed one (one where the user can only select items from the list).



- To delete the Description box, select the Description box and press Del.

- From the Control Palette toolbar, select the Variable Pick List and drag it to the location where you just deleted the description box
- Select the Pick List field and select Control Properties from the Edit or shortcut menu. The Control Properties screen appears.

- Select the Description field from the Field drop-down list.

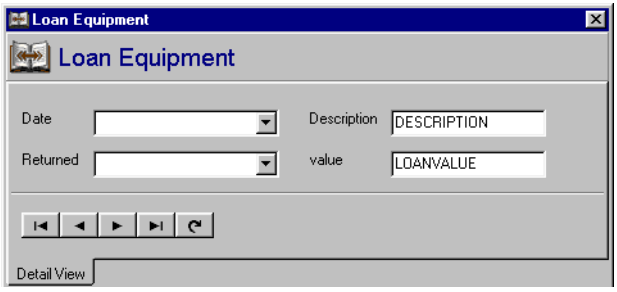


This links the Pick List control with the Description field.

- When you have done this, click OK.

7. To avoid wasted space on the form, you can reduce the size of the screen.
   - Select and drag the navigation buttons up the screen.

   - Now size the screen size so it looks similar to this.



8. Save the screen and exit Screen Designer to check the results in Personnel Director.

Example 3 continued: Modifying the New Screen

Now that you have successfully created the new Loan Equipment screen, you decide to customise it further to enter and display the following:

- The quantity of equipment the employee has. You also want to validate the field to ensure it has a number of 1 or greater.
- The total value of the equipment loaned.
- The reason for the loan.
- The Department to be charged.
- Equipment returned indicator.
- Notes or comments.

As you are customising the screen, you will also want to:

- Design a multi-page tab to avoid too large a screen.
- Align the labels to conform with the rest of the screens.
- Trigger a diary reminder for the return date.

To modify the Loan Equipment screen, first:

1. Open the Loan Equipment screen.

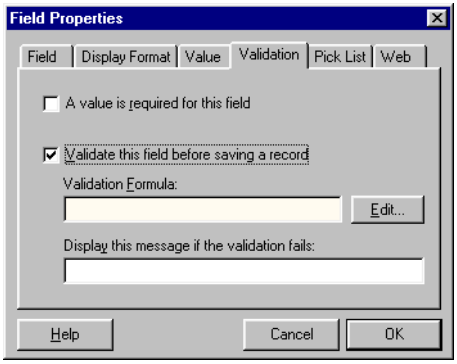
   - Click the Open button on the Screen Designer toolbar.
   - Select Loan Equipment from the Table list and click OK.

2. The first thing you need to do is make the screen larger by dragging it down to twice the height so you will have room to show all this extra information. When you do, this don't forget to move the Navigation buttons to the bottom of the screen.

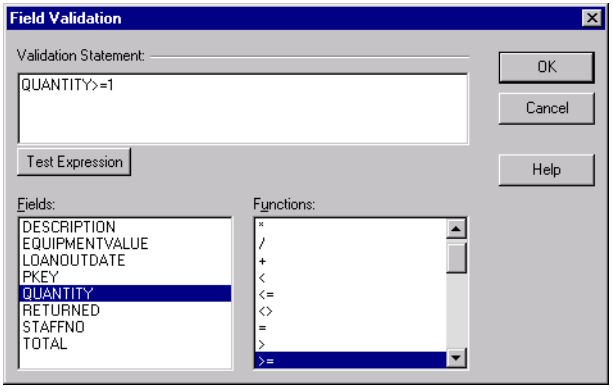
Set up a field for the number of items loaned to the employee. Validate the field to ensure it has a number of 1 or greater.

1. From the Field Chooser, select New, and create a field called **Quantity**. Assign it a type of Integer Number. When you are finished, drag the field onto the screen.
2. Repeat this step for another field, label it **Total,** and assign it a Decimal Number.

3. The next step is to set the validation for the Quantity field so its value is always 1 or greater.
   - Select Quantity in the Field Chooser screen, and click the Edit button. The Field Properties screen appears.
   - Select the Validation tab. Then, click the Validate This Field Before Saving A Record checkbox.



   - Click the Edit button to the right of Validation Formula.
   - From the Fields, list double-click Quantity (this will enter the word Quantity in the Validation Statement at the top of the screen).
   - Next choose the function; in this instance, if you want it to be greater or equal to (>=). Double click >= to place it in the statement.
   - Finally, you want the number to be greater or equal to 1. Type **1** at the end of the expression in the Validation Statement box.

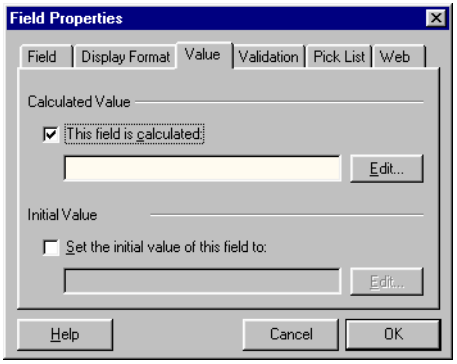


- You can now click the Test Expression button to check the validation. If the validation is correct, click OK.
- To save the validation, click OK.

4. You now need to enter an error message to be displayed if this field does not contain the correct information when a user clicks the Save button.
   - In the Display This Message If The Validation Fails box, type **Quantity of goods must be one or greater.** and click OK.

Set a field for the total value of the equipment loaned

1. Select the Total field in the Field Chooser screen and click the Edit button. The Field Properties screen appears.
2. Click the Value tab and then click the This Field Is Calculated checkbox.

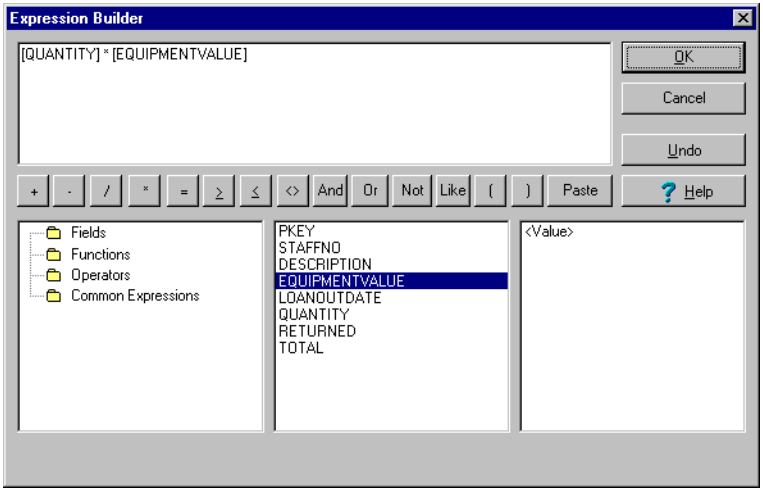


3. Click the Edit button. The Expression Builder is displayed.
   - Click the Fields folder to display a list of all available fields.
   - Create the formula: Quantity * EquipmentValue

     From the Fields folder double-click Quantity.

     Single-click the Multiply button on the Expression Builder toolbar.

From the Fields folder, double-click Value.

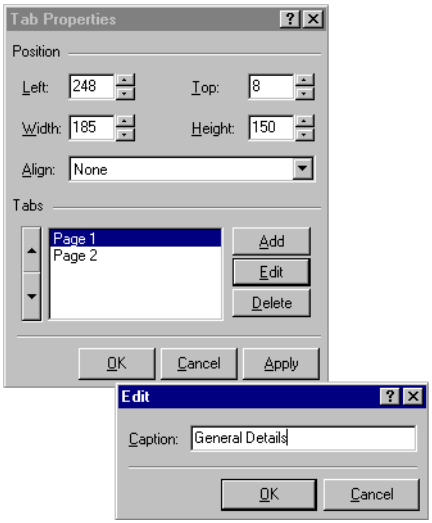


4. Click OK. This returns you to the Field Properties screen. Click OK to finish.

Design a Multi-Page Tab

1. To add a Multi-Page tab to the screen, select the Tab control on the Control Palette toolbar and drag it to an empty space on the main form.
2. Stretch the size of so it fills approximately half of the screen
3. Create additional tabs and specify their labels.
   - Click the tab control you just added and select Control Properties from the Edit menu (F11). The Tab Properties screen appears.
   - You need to add another tab to store the notes and comments. To do this, click the Add button. You now have two tabs, Page 1 and Page 2.

- Select Page 1 and click the Edit button. Change the caption to **General Details** (or the caption you would like on the tab).



- Click OK. Notice that the new caption you just changed replaced Page 1 on the Tab Properties screen.
- Do the same for Page 2, changing the caption to **Comments/Notes**.
- Click the OK button. Notice that the tab labels have changed.

Set Up a Field for Reason

Setting up a Reason field involves creating a new field called Reason and dragging it to the General Details tab. While doing this, decide if you want a Pick List for the field.

Set Up a Field for Department

To set up a field for Department, create the field as a Pick List. On the Pick List tab, click the More button and select the following details:

Pick List Type: Pick from Employee Data
Pick List Table: Employee Details
Pick List Field: Department

The list will show all the departments from the Employee Details screen.

1. From the Field Chooser, create a new field called Department. (The Department field should be defined as having a Pick List.)

2. From the Control Palette toolbar, drag the Variable Pick List control to the General Details tab.
3. Select Department in the Field Chooser screen and click the Edit button. This opens the Field Properties screen.
   - Click the Pick List tab, then select the This Field Has A Pick List checkbox.
   - Now click the More button. The Pick List Options screen appears.
   - From the Pick List Type drop-down, select Pick From Employee Data. From the Pick List Table drop-down, select Pick From Employee Details. From the Pick List field drop-down list, select Department.
   - Click OK to save the changes to the Pick List options. You will then see all of the departments listed.
   - Click OK button to save the properties.

Set Up a Checkbox for Goods Returned

Adding a check box to the General Details tab will indicate at a glance if the item has been returned. This field will also make it easier to run reports on goods that are on loan. (A checkbox is a box that, when clicked, will be either checked or clear.)

1. From the Field Chooser screen, click the New button.
2. Enter the field name as **Returned**; set its type as Logical.
3. Enter a description and label, then click OK.
4. Drag the Returned field from the Field Chooser screen to the General Details tab.

Create a Box for Notes or Comments

1. From the Field Chooser screen, click the New button.
2. Enter the field name as **Notes**; set its type as Notes.
3. Enter a description and label, then click OK.

4. Drag the Notes field from the Field Chooser screen to the Notes/ Comments tab.

Align the Labels on the Screen

The labels down the side of the screen for Date Out, Date Returned, and Description can be easily aligned.

1. Simply press Shift and click the labels (this highlights them all).
2. From the Alignment toolbar select the Align Left button. Then click anywhere on the screen to de-select the three items. Use this technique to align other elements on the screen.

You can also change the display format of the Value, Quantity, and Total boxes, (by default these are left justified).

3. Select the Value box and select Control Properties from the Edit menu (F11). The Control Properties screen appears.
4. Select Right from the Text Align drop-down list.
5. Repeat steps 3 to 4 to change the justification of the Quantity and Total fields.

When you make all the changes you want, select Save Screen from the File menu and then Exit to close the Screen Designer.

Create a Diary Reminder Trigger for the Return Date

You now need to open Personnel Director to set up the automatic Diary Reminder.

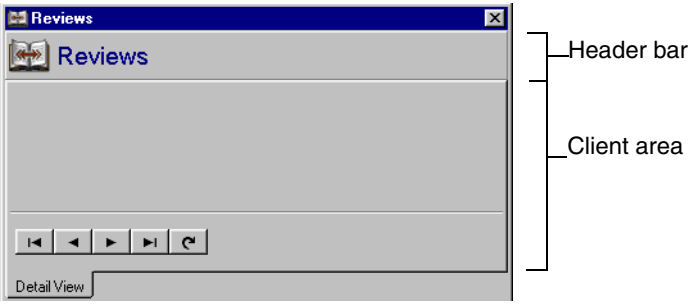
- See “Setting Up Automatic Reminders” on page 277 for further information.

You can now start using your new screen for data entry.

Working with Screens

Change an existing Personnel Director screen or design a new screen to collect additional information for your organisation. You basically redesign or design the Detail View tab by adding or changing the fields and display elements. (If you create a new screen, the Summary View and Attached Documents tabs appear automatically when the screen is accessed in Personnel Director.)

In Screen Designer, the Detail View tab screen is composed of two distinct areas: the Header bar and the Client area. You use Screen Properties to specify information you want to appear in the Header bar; this includes: the name and icon displayed, customised user notes (called Screen Notes), and screen print control. The Client is an area that contains the controls you drag from the Control Palette toolbar and is used to display and collect information.



Creating a New Screen

To collect additional sets of information for your organisation, you can design new screens with the fields you need. For example, perhaps you need a new screen to collect information on employees' performance reviews.

1. Do one of the following:

   - On the File toolbar, click the New button.

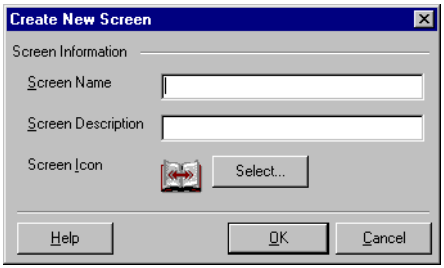
     – or –

   - From the File menu, select New Screen.

     – or –

   - Press Ctrl+N.

   The Create New Screen appears.



2. Provide the following information:

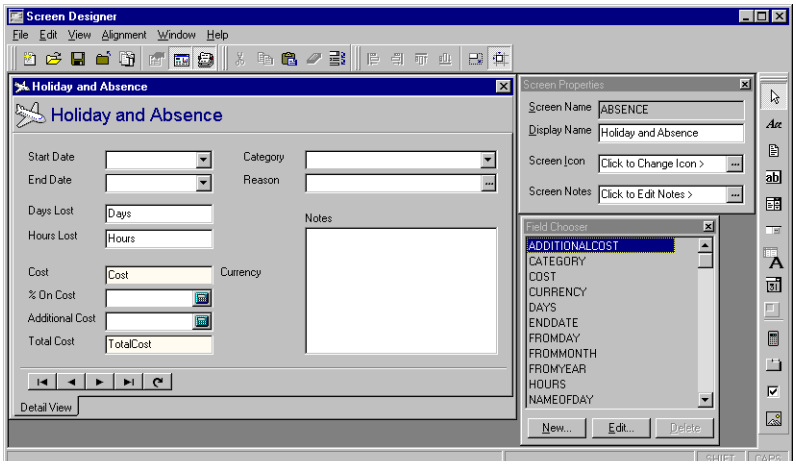
   Screen Name: Type the name for this screen (used for maintenance purposes.

   Screen Description: Type what you want to appear as the title of the screen.

   Screen Icon: Click the Select button and select the icon you want from those supplied with Personnel Director or one you created previously. Then click Open.

3. Click OK.

The new screen appears in the Screen Designer window along with the Screen Properties and Field Chooser dialog boxes.



4. Add or change the properties for the screen and its fields and controls.

   For more information about changing screen properties, see "Changing Screen Properties" on page 550.

   For more information about adding, changing, or removing fields, see "Working with Fields" on page 556.

   For more information about adding, changing, arranging or removing controls, see "Working with Controls" on page 571.

5. When you are finished, save the changes.

Changing an Existing Screen

You can change the Detail View tab of an existing Personnel Director screen or a screen that you previously created.

1. Do one of the following:

   - On the File toolbar, click the Open button.

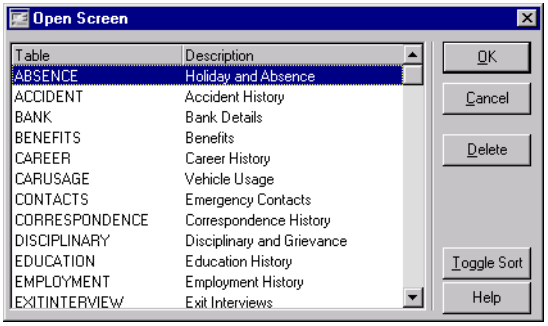
     – or –

   - From the File menu, select Open Screen.

     – or –

   - Press Ctrl+O.

   The Open Screen appears.



2. Select the screen you want to update and click OK.

   - To sort the list by Description, click the Toggle Sort button. To sort the list by Table, click Toggle Sort again.

   The screen you selected appears in the Screen Designer window along with its associated Screen Properties and Field Chooser dialog boxes.

3. Add or change the properties for the screen and its fields and controls.

   For more information about changing screen properties, see “Changing Screen Properties” on page 550.

   For more information adding, changing, or removing fields, see “Working with Fields” on page 556.

   For more information about adding, changing, arranging, or removing controls, see “Working with Controls” on page 571.

4. When you are finished, click the Save button on the File toolbar to save changes to the screen.

Changing Screen Properties

You can change the properties of a screen whenever required. If the Screen Properties screen is not already open, do one of the following:

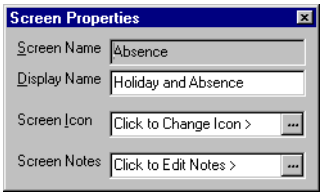
1. On the screen where properties are to be changed, do one of the following:

   - On the File toolbar, click the Screen Properties button.

     – or –

   - From the View menu, select Screen Properties.

   The Screen Properties dialog appears.



2. Add or change the following information:

   Screen Description: Type what you want to appear as the title of the screen.

   Screen Icon: Click the Select button and select the icon you want from those supplied with Personnel Director or one you created previously. Then click Open.

   Screen Notes: To add or update help tailored for users of this screen, click the Pick List button. (Adding screen notes adds the Question Mark icon to the screen which the user can click for additional help.) For more information about adding or updating screen notes, see "Adding or Updating Screen Notes" on page 551.

3. When you are finished, click the Save button on the File toolbar to save changes to the screen.

Adding or Updating Screen Notes

You can enter screen notes for a Personnel Director screen or a screen you created. With screen notes, you can tailor help to specifically address Personnel Director users' needs in your organisation. The contents of a screen note that you add or update, display when the user clicks the Question Mark icon on the screen. Screen notes can include special instructions, tips, and other helpful information.

1. If the Screen Properties screen is not already open, do one of the following:

   - On the File toolbar, click the Screen Properties button.

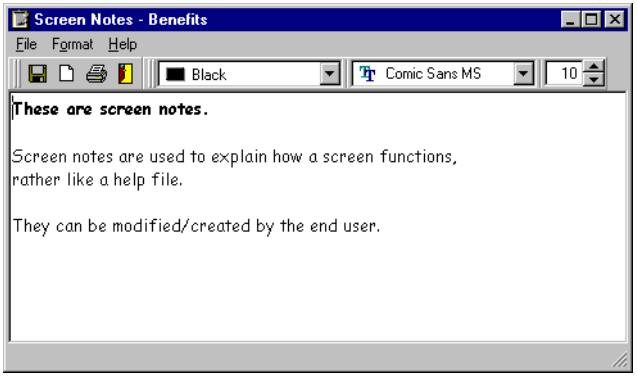
     – or –

   - From the View menu, select Screen Properties.

   The Screen Properties dialog appears.

2. To add or update help tailored for users of this screen, click the Screen Notes Pick List button.

   The Screen Notes editor appears.


Screen Notes - Benefits
File Format Help
Black
Comic Sans MS
10
These are screen notes.
Screen notes are used to explain how a screen functions,
rather like a help file.
They can be modified/created by the end user.

3. Replace the text with the screen notes you want.

   Use the Screen Notes toolbar buttons to format, print, and save the notes.

4. When you are finished, click the Save button to save the changes.

Using the Screen Notes Toolbars

Use the Screen Notes toolbar to format, print and save the notes you type.

	Save the notes.
	Clear (erase) the notes.
	Print the notes
	Exit Screen Notes
	Select the font.
	Select the font size.
	Select the font colour.

Deleting Screens

To reduce the number Personnel Director screens to those only needed for your organisation, simply remove the unnecessary screens from Personnel Director. This will simplify the interface for your users.

Important Notes:

- Deleting a screen not only removes the screen, but also removes its icon from the Personnel Director Shortcut bar, fields and all data associated with it.
- You can only delete screens you have created; you cannot delete screens delivered with Personnel Director.

1. Do one of the following:

- On the File toolbar, click the Open button.

– or –

- From the File menu, select Open Screen.

– or –

- Press Ctrl+O.

2. Select the screen to be deleted.
3. From the File menu, select Delete Screen.
4. Confirm that this screen is the one to be deleted. Click Yes.

Importing and Exporting Screens

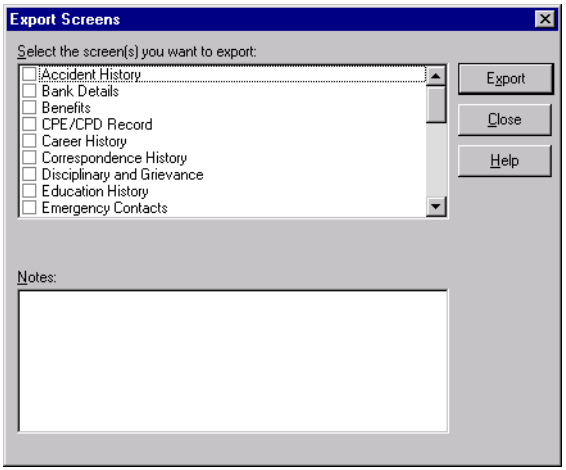
You can exchange customised or new screens with different installations of Personnel Director. If, for example, someone customised the Benefits screen and you want to implement their version on your system, simply have the person export the screen and then import it into your system.

Note: If you import a screen which has the same name as an existing screen, a message warns that you are about to replace the existing screen. At this point, you can rename the screen or cancel the import.

To export screens:

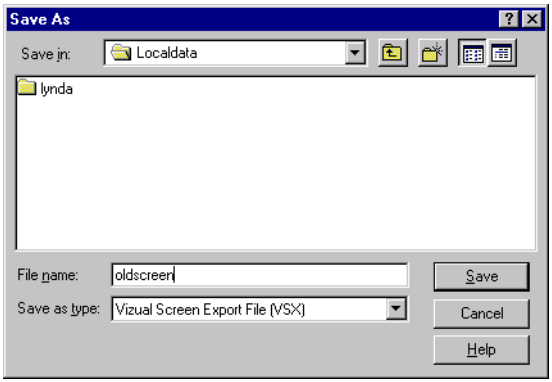
1. From the File menu, select Export Screens.

   The Export Screens appears.



2. Do the following:
   - Click the checkbox of one or more screens to be exported.
   - Type any notes or comments you want associated with this export under Notes.
3. Click the Start button.

   The Save As screen appears.

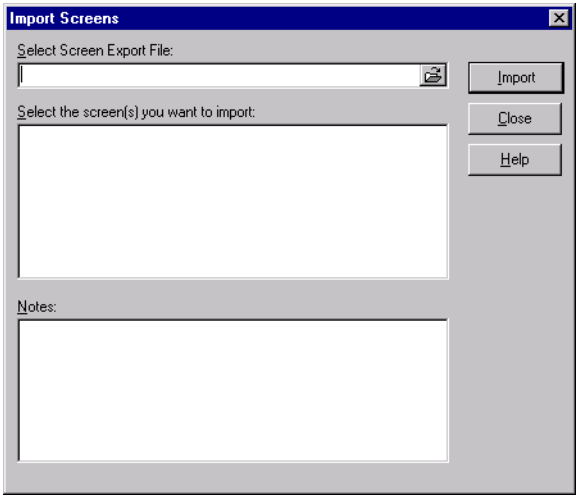


4. Select the path and type a name for the file (file type of *.VSX) to contain the screens. Then click Save and OK.
5. To exit, click Close.
6. Click OK.

To import screens:

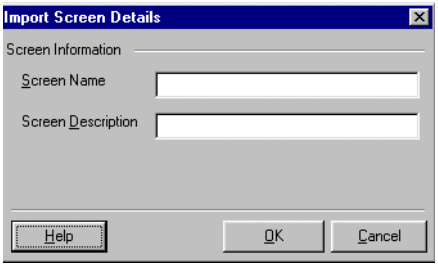
1. From the File menu, select Import Screens.

   The Open screen appears.



2. Click the Browse button to select the file containing the screens (file type of *.VSX) and click the Open button.
3. Under Select The Screens You Would Like To Import, click the checkboxes of the screens you want implemented on your system.
4. Then click Import.

***Note**: A message appears if a screen with the same name exists in Personnel Director asking if you want to replace the existing screen with the screen you are importing. If you click the No button,the following screen appears so that you can provide a different name and screen desctiption.*



Working with Fields

You can add new fields to any Personnel Director or customised screen. However, you can only change the change information boxes, labels, and the appearance of existing Personnel Director fields. This means you cannot remove Personnel Director fields from Personnel Director screens or change their basic properties.

Adding a New Field

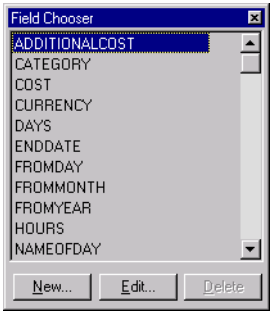
1. Do one of the following if the Field Chooser screen is not already displayed:

   - On the File toolbar, click the Fields button.

     – or –

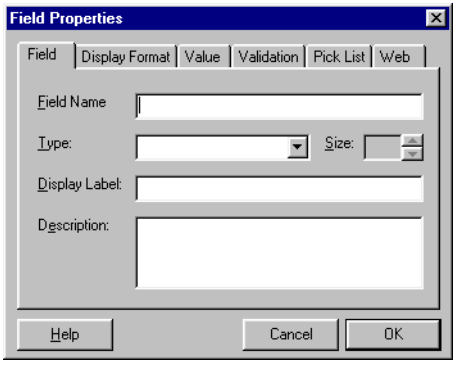
   - From the View menu, select Field Chooser.

The Field Chooser dialog appears.



2. To add a new field, click the New button.

   The Field Properties screen appears.



3. Provide the information about the field.

   Field Name: Type the name of the field. The name can contain the letters A to Z (upper or lower case) and numerals 1 to 9, but can have no spaces.

   Type: Select the type of the field. It can be: Date, Decimal Number, Image, Integer Number, Logical, Notes, Text, or Time.

   Size: If this is a Text field, type the maximum number of characters that users can enter.

   Display Label: Type the label to be displayed on the screen.

   Description: Type a description of the field.

4. When you are finished, click OK.

For information about specifying other field properties such as display validation, calculation and Pick Lists, see "Entering Additional Field Properties" on page 559.

Updating a Field

You can change any field property except the name, size, and type. To change the name, size, or type, you must delete the field and re-add it.

1. Do one of the following if the Field Chooser screen is not already displayed:

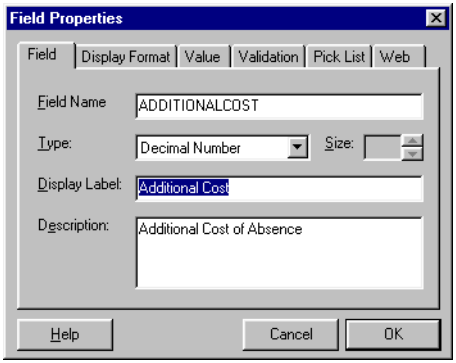
   - On the File toolbar, click the Fields button.

     – or –

   - From the View menu, select Field Chooser.

2. Select the field to be changed and click the Edit button.

   The Field Properties screen appears.



3. Update the information about the field.

   Display Label: Type the label to be displayed on the screen.

   Description: Type a description of the field.

4. When you are finished, click OK.

   For information about specifying other field properties such as display validation, calculation, and Pick Lists, see "Entering Additional Field Properties" on page 559.

Deleting a Field

Important Note: *You can only delete fields you previously created; you cannot delete fields delivered with Personnel Director.*

1. Do one of the following if the Field Chooser screen is not already displayed:

   - On the File toolbar, click the Fields button.

     – or –

   - From the View menu, select Field Chooser.

2. Select the field to be deleted and click the Delete button.
3. To confirm the deletion, click Yes.

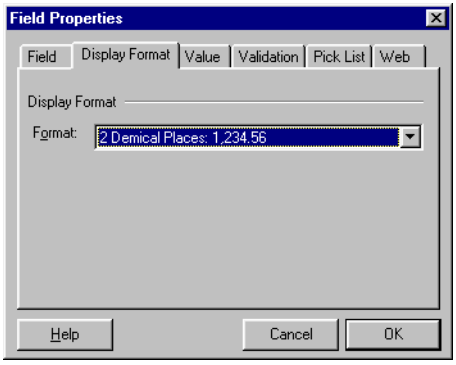
Entering Additional Field Properties

After you have created the field, you can specify additional properties.

- If the field is to display a calculated value or is to contain a default value, click the Value tab. See "Setting Field Value Properties" on page 560.
- If the entry of this field entry is to conform to specific data entry rules, click the Validation tab. See "Setting Field Validation Properties" on page 562.
- If the field is to be a Pick List, either fixed or variable, click the Pick List tab. See "Setting Field Pick List Properties" on page 563.

Setting Field Display Properties

Click the Display Format tab to specify the display format and the summary view for the field.



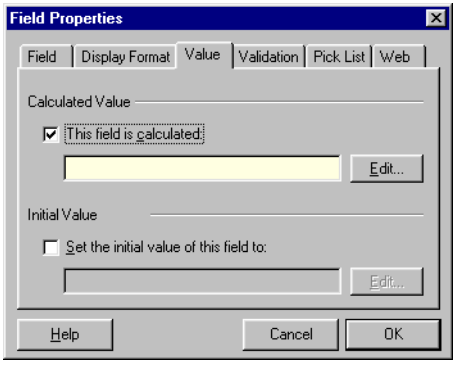
Provide the following information:

Format: Select how this field is to be displayed and stored.

Depending on the type of field selected, the options vary. For example, if you selected a text field, you can choose Normal, Uppercase, Lowercase, or Mixed Case format; if you selected a date field, you can choose Long, Medium, Short, or Windows default date formats.

Setting Field Value Properties

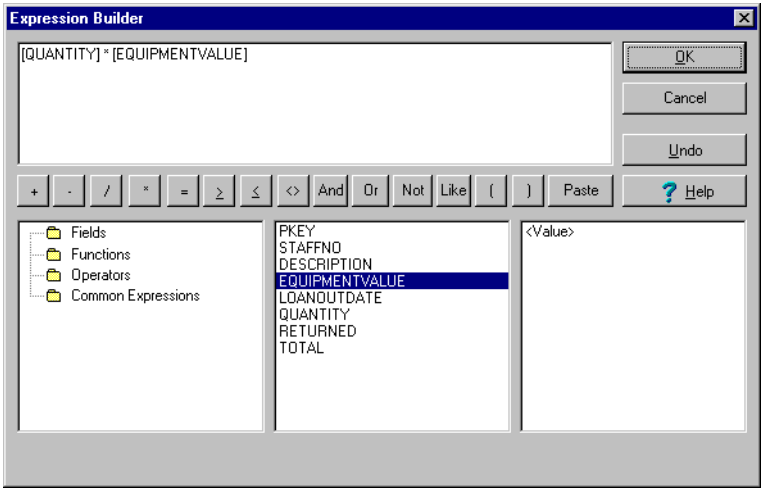
If this field is to display a calculated value or if it is to contain an initial default value, click the Value tab.



Provide the following information:

Calculated Field: Click this checkbox if this is a calculated field. To specify the calculation, click the Edit button.

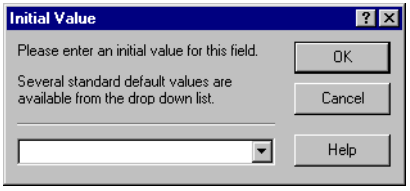
The Expression Builder screen appears.



Specify the calculation and click OK. For more information about defining calculations, see “Entering Calculated Values” on page 569.

Initial Value: Click this checkbox if this field is to display an initial value. Then click the Edit button.

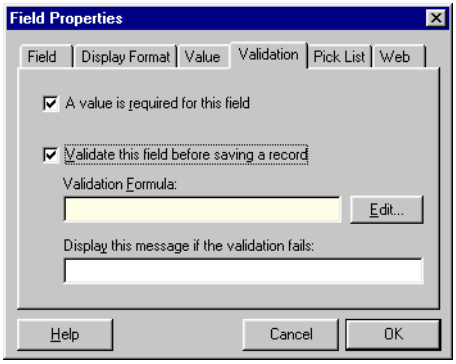
The Initial Value screen appears.


Initial Value
Please enter an initial value for this field.
Several standard default values are available from the drop down list.
OK
Cancel
Help

Either type the value or select it from the drop-down list, then click OK.

Setting Field Validation Properties

If this field is to be verified, click the Validation tab to set the rules to be used.



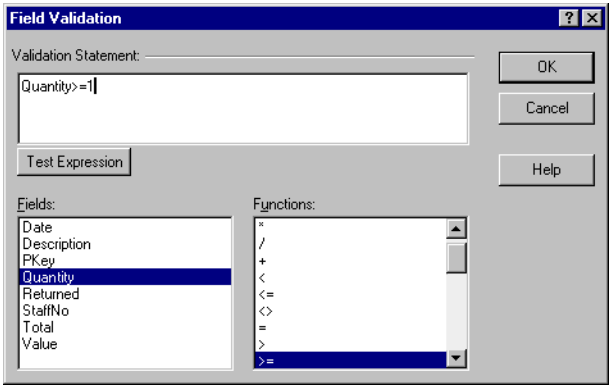
Provide the following information:

A Value Is Required For This Field: Click this checkbox if the field is mandatory.

Validate This Field Before Saving: Click this checkbox if the field must be verified before the record is saved.

Validation Formula: To enter a validation formula, click the Edit button. (The Validate This Field Before Saving checkbox must be selected.)

The Field Validation screen appears.

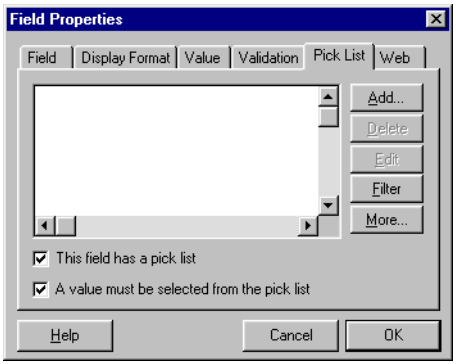


Enter the formula, then click OK. For more information about entering field verification formulae, see “Entering Field Validation Formulae” on page 568.

Display This Message If Validation Fails: Type the message that is to appear if the verification fails.

Setting Field Pick List Properties

If the user is to select the value for this field from a Pick List, click the Pick List tab. You can set whether or not the Pick List is fixed.



Provide the following information:

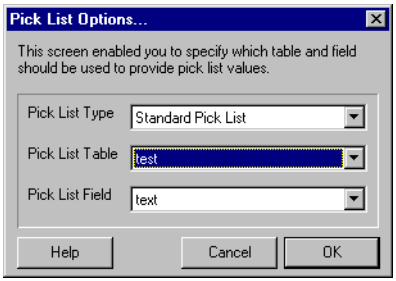
This Field Has A Pick List: Click this checkbox if this field is to be a Pick List.

A Value Must Be Selected From the Pick List: Click this checkbox if a value must be selected from the list; if the user is to be able to add values, clear this checkbox.

- To add a value, click the Add button. Type the new value and click OK.
- To remove a value, select the value and click the Delete button. To confirm the deletion, click Yes.

If the items in the Pick List are values in another field in Personnel Director click the More button.

The Pick List Options screen appears.



Pick List Type: Select one of the following types:

Standard Pick List. Create a standard Pick List. Users can add or remove items from this Pick List if you deselect the A Value Must Be Selected From the Pick List checkbox on the Pick List tab.

Pick From Employee Data. Create a Pick List from Employee data; for example, Post Names. Users cannot add or remove items from this type of Pick List.

Pick From Company Data. Create a Pick List from Company data; for example, Currency. Users cannot add or remove items from this type of Pick List.

Pick List Table: Select the table in which the field to be used as the Pick List is found.

Pick List Field: Select the field to be used as the Pick List.

Creating Linked Pick Lists

You can also set up a Pick List which is dependent on the pick value selected in another Pick List.

For example create two Pick Lists: COUNTRY and CITY. The relationship between the Pick Lists is one of parent and child. The values in CITY will be determined by a value selected from COUNTRY. Assign the following values to COUNTRY: Great Britain and United States. Assign CITY with the following values: London, Edinburgh, New York and Los Angles.

Step 1: Create the Pick Lists to be linked and enter the items for each Pick List.

Step 2: Link the Pick List to the field

If the Pick List is to be dependant on the selection value in another Pick List, select the dependant Pick List from the Field Chooser screen. Click the Edit button to open Field properties. On the Pick List tab click the Filter button and then select the parent Pick List value from the Filter Field drop-down list. This links the Pick Lists setting the parent-child relationship.

Click OK.

For example, in the Cities Pick List, set the field COUNTRY as the filter.

Step 3: Set or change the item to be linked

From the Field Chooser screen, select the dependant Pick List (in this instance, CITY). Click the Edit button to open Field Properties. On the Pick List tab, select a Pick List item (London).

Do one of the following:

- To add a new value to the Pick List and set the Filter Value, click Add.
- To edit existing Filter Values, click Edit.

Add the new item in the Pick List Value field, select the filter value from the Filter Value drop-down list and click OK.

The Filter Value for London is Great Britain. Repeat Step 3 for all of the values in the child/dependent Pick List; for example, Edinburgh, New York, Los Angeles.

Step 4: Place the Pick Lists onto the screen and save the screen.

Linking More than Two Pick Lists

You can link more than two Pick Lists. We recommend you identify the parent-child relationships and build the list from the top down; that is parent to child.

To illustrate, let's extend the above example to add the Pick List STREET. The relationship is as follows. COUNTRY is the parent of CITY and CITY is the parent of STREET.

Set the STREET Pick List values to following values: Oxford St, Bond St, 42nd St and Madison Ave.

To set this link follow Step 2 above. Link the STREET Pick List to CITY thereby setting CITY as the Filter field for STREET. The Pick List values in STREET will be made dependent on CITY.

Then link the individual Pick List values of the STREET Pick List to the values in the CITY Pick List as in Step 3 above.

With the Pick List selection Great Britain is selected from the COUNTRY Pick List and London is selected from the CITY Pick List, then the STREET Pick List will display Oxford St and Bond Street.

Note 1: Avoid Creating Cyclical Links

Example: When the COUNTRY Pick List is set as the filter field for CITY, do not set CITY as the filter field for COUNTRY.

Note 2: Behaviour at Run Time

When linking variable Pick Lists it is important to note that it is possible to add values to the Pick Lists that will observe the filter rules from the parent Pick List. Referring back to the COUNTRY and CITY example, if the display value

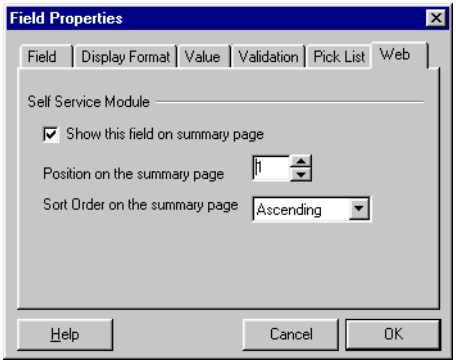
of the COUNTRY Pick List is Great Britain and the user adds a Pick List value to the CITY Pick List then this value will only be displayed when the COUNTRY Pick List value is Great Britain.

Note 3: Limitations

- Linked pick lists work only if both pick lists are on the same screen.
- Linked pick lists work with screens that can be edited in Screen Designer.
- Linked pick lists do not support the advanced pick list settings found on the Pick List Options screen.

Setting Web Properties

If this field is also to be used in the Employee Self-Service module, set its web properties.



Provide the following information:

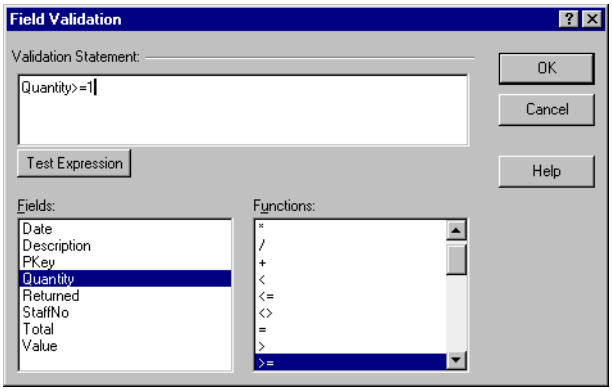
Show This field On Summary Page. Click this checkbox if this field is to be displayed in the Summary Page of the Employee Self-Service module.

Position On The Summary Page. Indicate the position where the field is to displayed on the Summary Page. Select the position from the drop-down list.

Sort Order On The Summary Page. Specify how this field is to be sorted when displayed on the Summary Page. Select the order from the drop-down list.

Entering Field Validation Formulae

Use the Field Validation screen to enter a rule for the field. This rule is to be performed each time data the user enters data in this field. If the data does not conform, the user receives an error message.



The validation rule must produce a true or false result; for example: TotalCost > 1000 will produce a true/false result, whereas TotalCost * 1000 will not.

To create the rule:

1. Double-click the desired field from the Field list.
2. Double-click the desired function from the Functions list.
3. Type the value in the Validation Statement.
4. Check the validity of the expression by clicking the Test Expression button.
5. Click OK.

Following are some examples of validation rules used in current Personnel Director screens.

- To ensure that the end date of absence is greater than or equal to the start date.

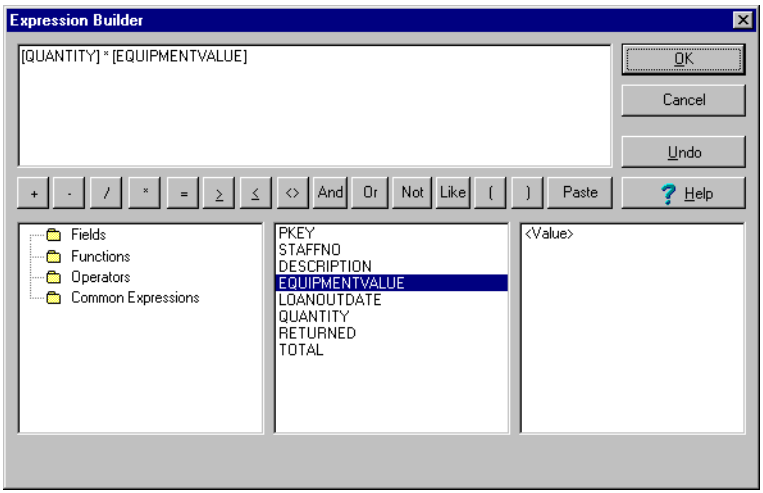
  ```
  EndDate >= StartDate
  ```

- To ensure that the equipment VALUE is greater than 1.

  ```
  VALUE > 1
  ```

Entering Calculated Values

Use the Build Expression screen to specify the formula for the calculation. The result is updated when the user enters data in the fields used as the basis for the calculation and appears when the user displays the screen.



To create the calculation, double-click the desired folders to display and select the Fields, Functions, Operations, and Common Expressions you want.

Following are some examples of field calculations used in current Personnel Director screens.

- To calculate the number of days between the date the employee joined the company and today, determine the number of days between the date when the employee joined and the current date.
  (Employee Details - LengthofService).

  ```
  DATEDIFF([DateJoin],Today())
  ```

- To calculate the total cost of an absence, add the cost of the absence, the percentage of on-costs, plus the additional costs.
  (Holiday and Absence - TotalCost)

  ```
  [Cost] + ( ( [OnCost] / 100) * [Cost] ) + [AdditionalCost]
  ```

- To extract the year from the date.
  (Holiday and Absence - FromYear)

  ```
  YEAR([StartDate])
  ```

- To calculate the difference between planned and actual structural training points.
  (CPE/CPD Record - UnstructuredVariance)

  ```
  [UnstructuredActual] - [UnstructuredTarget]
  ```

- To calculate double time.
  (Pay History - DoubleTime)

  ```
  [HourlyRate] * 2
  ```

Some useful calculations include:

- The day of the current date. `Day`[*date-field*]
- The name of the day of the current date. `DayName`[*date-field*]
- The month of the current date. `Month`[*date-field*]
- The name of the month of the current date. `MonthName`[*date-field*]

Working with Controls

Use the buttons on the Control Palette toolbar and drag them to the screen to add:

- Date, text, and numeric data entry field controls.
- Interactive controls, such as checkboxes and Pick Lists.
- Display controls, such as labels, lines, boxes, frames, information boxes.
- Tabs and their associated pages.

You can add the following items to a screen or tab:

- Field label and database label controls.
- Note, edit, date and calculator data entry boxes.
- Fixed and variable Pick Lists.
- Check boxes.
- 3-D display effects such as lines, boxes and frames.

For more information about the types of controls, see “The Control Palette Toolbar” on page 525.

If the control is to be associated with a specific field, you then specify Object Properties to link the control to the appropriate field. After you add the basic elements, you can use the various Screen Designer tools to align, size, and handle any overlapping of the controls.

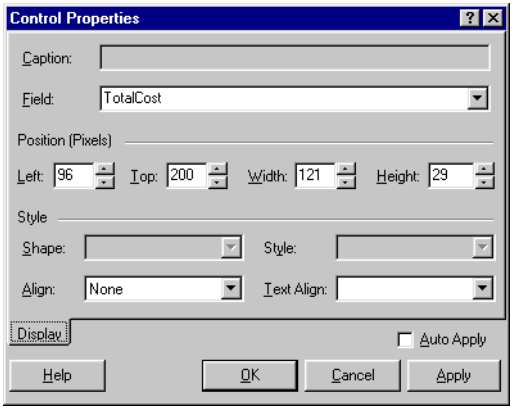
Adding a Control

1. Click the control you want for this field on the Control Palette toolbar and then place it on the screen by clicking the desired location. For example, to add a date field, click the Date button, then click where it is to be placed on the screen.
2. Select the control and do one of the following:
   - Double-click the control.

     -or-

   - Press F11.

The Control Properties dialog appears.



3. Specify the properties for the control.

   Caption: For checkbox controls, type the caption for this field.

   Field: Select the name of the field from the drop-down list to link to this control.

   Position

   Left: Enter the measurement, in pixels, from the left edge of the screen to left edge of the control.

   Top: Enter the measurement, in pixels, from the top of the screen to the top edge of the control.

   Width: Enter the measurement, in pixels, from the left edge of the control to its right edge.

   Height: Enter the measurement, in pixels, from the bottom of the control to the top of the control.

   Style

   Shape: Select the shape for a Bevel control. Choose one of the following shapes: box, frame, top line, bottom line, left line, right line, or a spacer.

   Style: Select the 3-D style for a Bevel control. Choose either Lowered (sunken lines) or Raised (elevated lines).

   Align: Select the alignment of the control to the edges of the Client area. Choose from: None, Top, Bottom, Left, Right, or Client.

Text Align: Select the start position for text entry. Choose from Left, Right or Centre.

Auto Apply: Click this checkbox if you want to apply the changes to this control's properties when you close this screen.

4. When you are finished, click OK.

Changing Control Properties

1. Select the control for the field and do one of the following:
   - Double-click the control.

     -or-

   - Press F11.

   The Control Properties dialog appears.
2. Change the properties for the control.
3. When you are finished, click OK.

Cutting, Copying, and Pasting a Control

You can use the Cut, Copy, and Paste functions of Screen Designer to move and copy controls you have already created.

To copy a control to the clipboard, select the control to be copied and do one of the following:

- Click the Copy button from the Edit toolbar.

  -or-

- Select Copy from the Edit or shortcut menu.

  -or-

- Press Ctrl+C.

To cut a control and copy it to the clipboard, select the control to be cut and do one of the following:

- Click the Cut button from the Edit toolbar.

  -or-

- Select Cut from the Edit or shortcut menu.

  -or-

- Press Ctrl+X.

To paste a control from the clipboard

- Click the Paste button from the Edit toolbar.

  -or-

- Select Paste from the Edit or shortcut menu.

  -or-

- Press Ctrl+V.

Deleting a Control

1. Select the control for the field and do one of the following:

   - Click the Delete button from the Edit toolbar.

     -or-

   - Select Delete from the Edit or shortcut menu.

     -or-

   - Press Ctrl+X.

2. When you are finished, click to save the changes.

Aligning Controls

You can easily align two or more controls using the snap to grid or the alignment buttons on the Alignment toolbar.

Using the Grid

With the grid turned on, any object you select or drag will snap to the closest grid intersection.

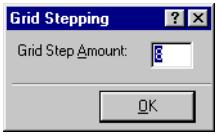
To turn the grid on or off:

- From the Alignment toolbar, click the Grid button. Click the button again to return it to its former mode.

You can increase or decrease grid spacing. To change the grid setting:

1. From the Alignment menu, select Grid Step.

   The Grid Stepping screen appears.



2. Enter the measurement, in pixels, between the horizontal and vertical lines of the grid.
3. Click OK.

Using the Alignment Buttons

You can align two or more controls along the top, sides, or bottom using the buttons on the Alignment toolbar.

	Align the objects to the left of the left-most object.
	Align the objects to the right of the right-most object.

	Align the objects to the top of the highest object.
	Align the objects to the bottom of the lowest object.

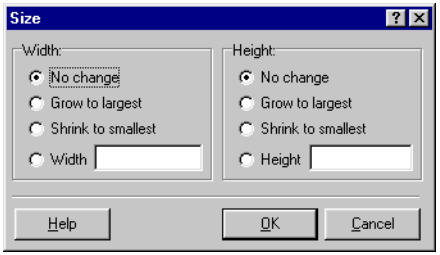
Sizing Controls

You can easily change the size one or more controls.

1. Select the control(s) to be sized.
2. Do one of the following:

   - Click the Size button on the Alignment toolbar.
   - Select Size from the Alignment or shortcut menu.

   The Size dialog appears.



3. Change the size.

   Width

   No Change: Select if there is to be no change to the width.

   Grow To Largest: Select if you selected two or more objects, and want the smaller controls to inherit the width of the largest.

   Shrink To Smallest: Select if you selected two or more objects, and want the larger controls to inherit the width of the smallest.

   Width: Specify the exact width in pixels.

Height

No Change: Select if there is to be no change to the height.

Grow To Largest: Select if you selected two or more objects, and want the smaller controls to inherit the height of the largest.

Shrink To Smallest: Select if you selected two or more objects, and want the larger controls to inherit the height of the smallest.

Height: Specify the exact height in pixels.

4. When you are finished, click OK.

Handling Overlapping

When you place controls on the screen, one or more controls may overlap one another. You can change how controls overlap by placing them in front or behind one another. This is especially useful when controls are placed on top of a bevel to place the bevel behind the controls.

To move one or more objects to the foreground:

1. Select one or more objects you want to move to the foreground.
2. From the Edit or shortcut menu, select Bring To Front.

To move one or more objects to the background:

1. Select one or more objects you want to move to the background.
2. From the Edit or shortcut menu, select Send To Back.

Setting Up Tabs

If you have more information than can fit on a single screen, you can create a tab similar to those in the Personnel Director Employee Details screen. A tab can contain one or more pages.

After you create a tab, you can then add the desired field and display controls.

Adding a Tab

- To add a tab, drag the Tab button on the Control Palette toolbar to the desired position on the screen.

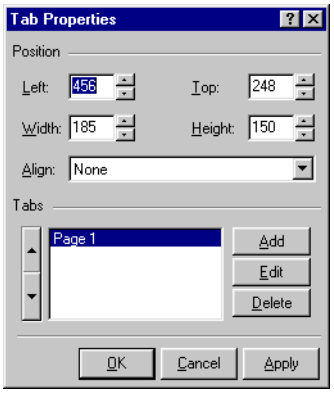
Changing Tab Properties

1. Select the tab control and do one of the following:
   - Double-click the Tab control.

   -or-

   - From the Edit or shortcut menu, select Object Properties.

   The Tab Properties screen appears.



2. Change the tab's position, if necessary. (To implement location changes immediately, click the Apply button.)

   Left: Enter the measurement, in pixels, from the left edge of the screen to left edge of the control.

   Top: Enter the measurement, in pixels, from the top of the screen to the top edge of the control.

   Width: Enter the measurement, in pixels, from the left edge of the control to its right edge.

Height: Enter the measurement, in pixels, from the bottom of the control to the top of the control.

Align: Select the alignment of the control to the edges of the Client area. Choose from: None, Top, Bottom, Left, Right, or Client.

3. Specify the pages for this tab. (To implement page changes immediately, click the Apply button.)
   - To add a tab, click the Add button. A new page appears in the Tabs list.
   - To change the page caption (label), select the page and click the Edit button. Type the caption and click OK.
   - To remove a page, select the page and click the Delete button.
   - To change the page sequence, select the page to be reordered and click the Up or Down arrow to move it to its new location.
4. When you are finished, click OK.

Adding a New Page to a Tab

You can add as many pages as you want to the tab. If the pages extend past the right side of the tab, navigation controls are automatically inserted so users can click the controls to display the remaining pages.

1. Select the Tab control where the page is to be added.
2. Right-click and select Add Page from the shortcut menu.

   The new page appears on the tab.
3. To change the page caption sequence, see “Changing Tab Properties” on page 578.

Changing Paging Order in a Tab

You can change the order in which users switch from page to page within a tab control.

1. Select the Tab control where you want to change the paging order when the Tab key is pressed.
2. Double-click the Tab control or press F11.

   -or-

   From the Edit menu, select Control Properties.
3. To change the page sequence, select the page to be reordered in the list of pages, then click the Up or Down arrow to move it to its new location.
4. When you are finished, click OK.

Removing a Page from a Tab

You can delete any page except the first. To delete the first page, you must delete the Tab control.

To delete a page:

1. Select the Tab control where the page is to be deleted.
2. Right-click the page to be deleted and select Delete Page from the shortcut menu.

Designing Screen Prints

Read the following section to learn how to modify existing Personnel Director screen prints and create screen prints for screens you create yourself. These are the printouts that are generated when you click the Print button when one of the employee records is displayed.

Note: *If you do not create a screen print for screens you create, a rudimentary printout is generated.*

Opening Screen Print Layouts

1. Do one of the following:
   - Open an existing screen.

     – or –

   - Create a new screen.

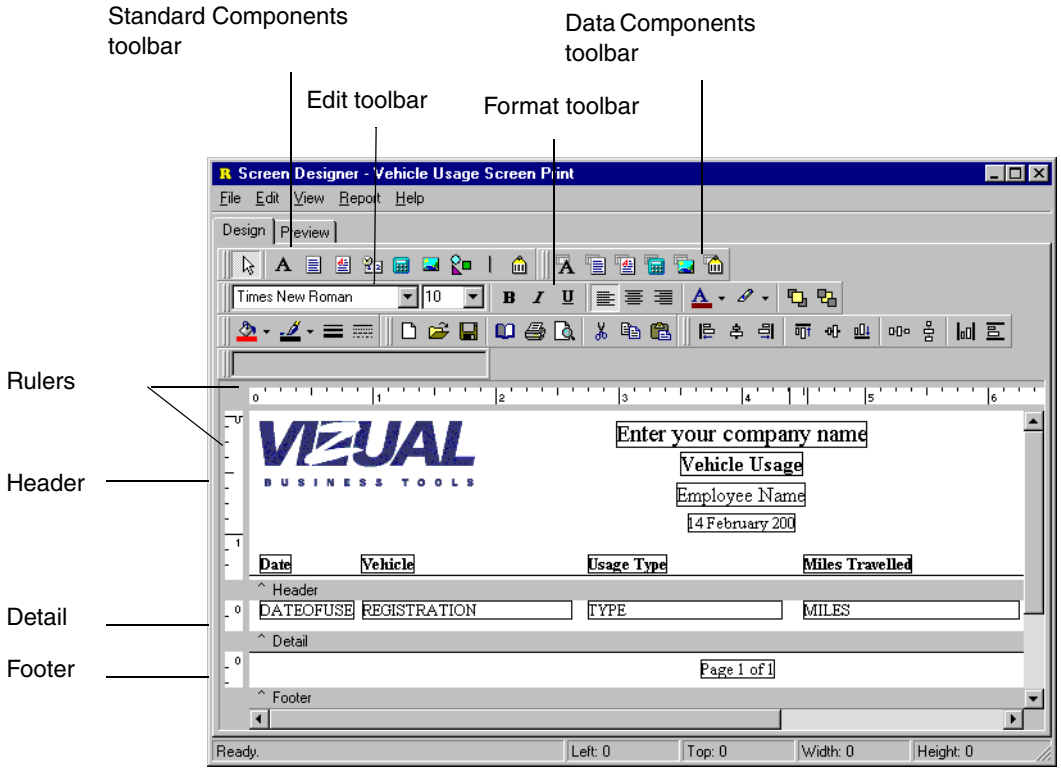
     The screen's fields must be defined and saved. For more information, see "Working with Screens" on page 546.
2. Select Design Screen Print from the File menu.

   For example, if you open the Vehicle Usage screen and select Design Screen Print from the File menu, the Screen Designer - Vehicle Usage Screen Print screen appears.

About the Screen Print Window

When you create a new screen print or open an existing screen print with Screen Designer, the following window appears. As with other Personnel Director reports, the screen print report is divided into three sections: Header, Detail, and Footer.

When you create a screen print for a new screen, Screen Designer displays a blank screen print report with the company logo and screen name in the header and the page number in the footer. When you are modifying an existing screen print, the fields appear in the Detail section.



Use the various toolbars to create layout required by adding, removing, positioning, and formatting fields previously defined for the screen. Build or modify the layout by placing and arranging objects using the tools on the following toolbars.

- Standard Components
- Data Components
- Format
- Edit
- Draw
- Align or Space
- Size
- Nudge

Viewing the Toolbars

Only the Standard Components, Data Components, Format, and Edit toolbars are shown when you first open a screen print. To display and use the other toolbars, follow this procedure:

1. Select View from the Toolbars menu.
2. Select or deselect the active toolbars from the drop-down menu.

   A checkmark means that the toolbar is active. Each of these toolbars is described on the following pages.

More information about how to use these toolbars appears later in this chapter.

Examples

This section contains two examples for you to follow:

- Modifying an existing screen print.
- Creating a screen print for a screen you created yourself.

Note: *When viewing the result of a screen print you modified or created while in Personnel Director, be sure that there are existing records or the report will be blank.*

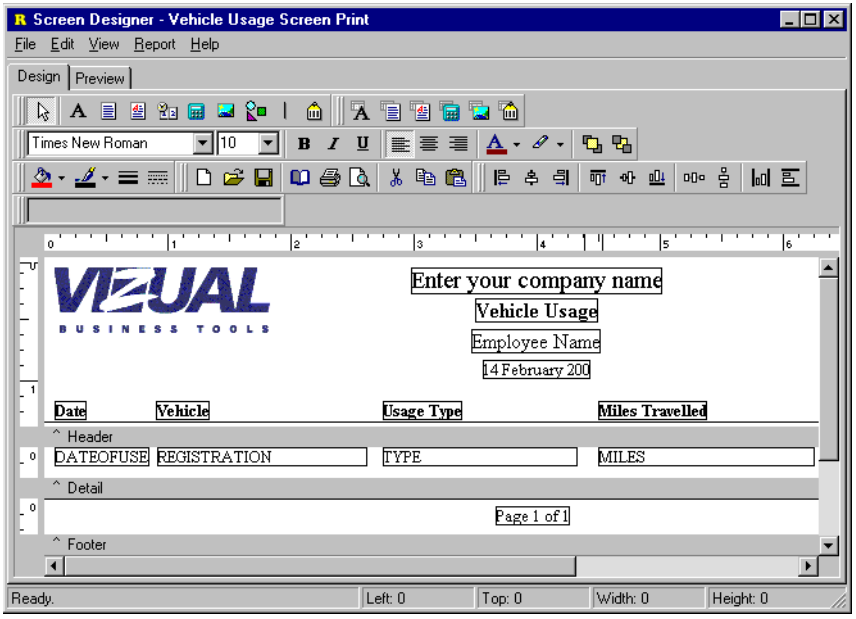
Example 1 - Modifying a Screen Print Layout

In this example, work through each step in modifying the existing screen print layout for the Vehicle Usage screen provided with Personnel Director.

You decide to move the Usage Type label and field, and add the Vehicle Usage Notes label and field to the end of the line.

1. Open the Vehicle Usage screen.
2. Select Design Screen Print from the File menu.

The Screen Designer - Vehicle Usage Screen Print screen appears.



3. To move the Usage Type label and Type field to a temporary location, click and drag the Detail separator bar down to increase the space in the Detail section. Then press the shift key and click both the Usage Type label and Type field and drag them down into the body of the Detail section.
4. Press the shift key and click the Date label, Date field, Vehicle label, and Registration and drag them to the left until positioned to the right of Miles Travelled.

5. To add a Notes label, click the Label button, then click in the Header to the right of the Miles Travelled label to place the new label.

6. In the Label box in the toolbar, type **Notes**.

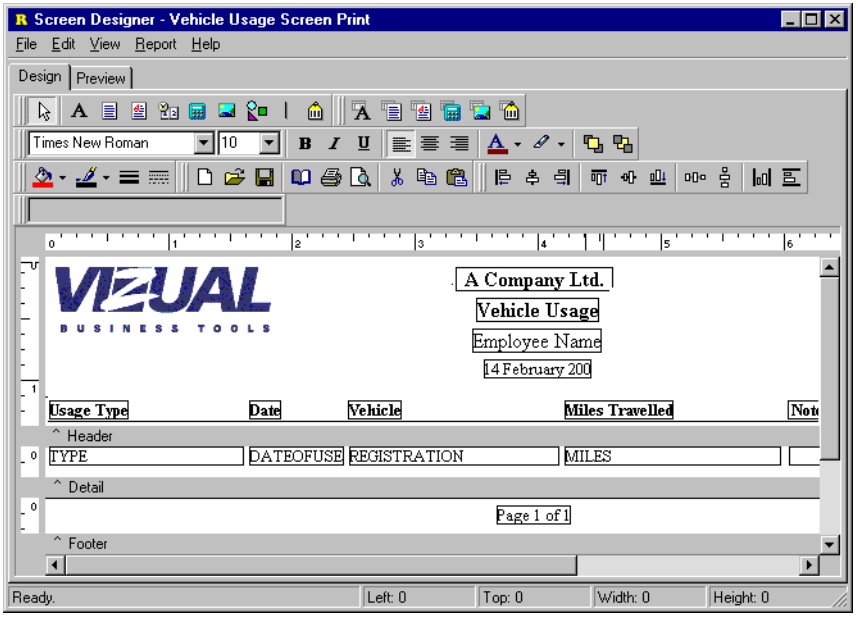
7. To add the Notes field, click the DBMemo button, then click in the Detail section to the right of the Miles field to place the new Notes field. Adjust the size of the field as necessary.

8. Select Notes from the Field drop-down on the toolbar.

Because content in the Notes field is variable – that is in some notes the length could be one line and in another it could be several – the field properties must be set so that the field grows with the content.

9. Right-click the Notes field and select Stretch from the shortcut menu.

   The Vehicle Usage screen print should look similar to this.



10. Click the Save Report button or select Save from the File menu.
11. Preview the results by clicking the Screen Designer Preview tab.

Now return to Personnel Director to check the result with real data. Remember to check that there are Vehicle Usage records before clicking the Print button.

Example 2 - Creating a Screen Print Layout for a New Screen

Using the techniques you learned when modifying a screen print, you are now ready to create a screen print for the Uniforms Issued screen you created in “Example 2: Creating a New Screen (Basic)” on page 531.

1. Open the Uniform screen.
2. Select Design Screen Print from the File menu.

   The Screen Designer - Uniforms Issued Screen Print screen appears.
3. Add labels and fields for Date Issued, Renewal Date, and Description.

- To add a label, click the Label button, then click in the Header to the place the new label.

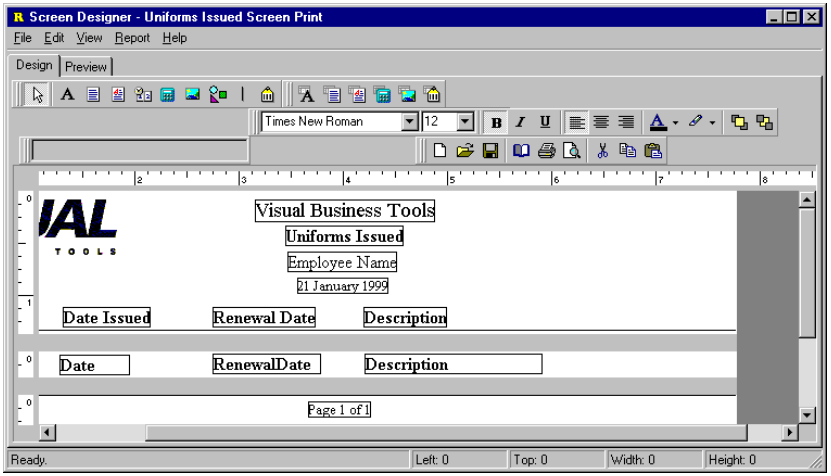
  In the Label box in the toolbar, type the caption for the label.

- To add a field, click the DBText button, then click in the Detail section to place the new field. Adjust the size of the fields as necessary.

  Select Notes from the Field drop-down on the toolbar.

Note: *You do not need to modify the Company Name, Screen Name, or Logo controls. If you delete these controls, they will not appear when printing the screen print.*

The Screen Designer - Uniforms Issued Screen Print screen should be similar to this.



4. Click the Save Report button or select Save from the File menu.
5. Preview the results by clicking the Screen Designer Preview tab.

Now return to Personnel Director to check the result with real data. Remember to add a few Uniform records before clicking the Print button.

Additional Examples - Formatting Techniques

Aligning Objects

Suppose you need to align field labels so that they appear in a straight line.

1. Select the field labels to be aligned.
2. Click the Align Top button on the toolbar.

Changing Fonts

You decide to change the font of the label to underscore its importance.

1. Select the label where the font is to be changed.
2. In the Formatting bar at the top of the window, select the font Arial from the Font drop-down list.
3. To change the font style, click the Italic button to make the label italic.

Adding Graphic Elements and Colours

You can add horizontal or vertical lines to divide areas of the screen print or to provide emphasis.

1. Click the Line button in the Standard Components toolbar, then click in the screen print section where you want to place the line. Use your mouse to adjust the length of the line.
2. To change the colour of the line, click the arrow to the right of the Line Colour button on the Draw toolbar, and change the colour to red.

Changing Background Colours

Suppose that you want to change the background colour in the Header from white to red.

1. Click the Shape button on the Standard Components toolbar and click in the Header section. Drag the corner handles until the rectangle covers the header section.

2. In the Format toolbar, click the arrow to the right of the Fill Colour button on the Draw toolbar. Select the colour of your choice.
3. To show the labels and fields hidden by the rectangle, right-click the rectangle, then select Send to Back from the shortcut menu.

Creating a Border

You can use the Shape button to add a border around the Detail section of the screen print.

1. Click the Shape button, then click inside the screen print the top left corner of the Detail section to place the rectangle. Drag the lower right corner handle to the lower right corner of the section.

2. In the Draw toolbar, click the arrow to the right of the Line Colour button, then select red for the border colour.
3. To show the labels and fields hidden by the rectangle, right-click the rectangle, then select Send to Back from the shortcut menu.

Using Page Layout Tools

Use the Screen Designer - Screen Print toolbars to format the layout of your screen print.

Placing Labels, Shapes, and Images

Use the buttons on the Standard and Data Components toolbars to define and arrange content in the screen print.

To place non-field objects on the screen print:

1. Click a button on the Standard Components toolbar to place a non-field object on your screen print.

Button	Action	Description
	Select Object	Select a placed object
	Label	Place a text caption or label

	Memo	Place a text memo (multi-line)
	Rich Text	Place a rich text object (contains formatting such as bolding, color, and bullets)
	System Variable	Place a date (the date when screen print is displayed or printed)
	Variable	Place a field that requires calculation
	Image	Place a picture (must be .BMP, .ICO, .EMF or .WMF format).
	Shape	Place a geometric shape
	Line	Place a line
	Bar Code	Place a bar code graphic

2. Then click the position where you want the object placed in the report.
3. If required, set the properties of the object:
   - If you placed a label, type the text in the Label box that appears on the toolbar.
   - If you placed a memo, right-click the object and select Lines from the shortcut menu. Type the text and click OK.
   - If you placed an image, right-click the object and select Picture. Then select the location and filename of the file containing the image.
   - If you placed a bar code, right-click the object and select Configure to set the properties of the bar code, then click OK.

To place field objects that you previously defined for the screen:

1. Click a button on the Data Components toolbar to place the field object on your screen print.

Button	Action	Description
	DBText	Place a field
	DBMemo	Place a memo field (multi-line)
	DBCalc	Place a field which contains a calculation

	DBRich	Place a field that contains a rich text object (formatting such as bolding, color, and bullets)
	DBImage	Place a field which contains an image
	DBBarCode	Place a bar code field.

2. Click the position where you want the object placed in the report.
3. Select the field you previously defined from the Field drop-down list.

Positioning and Sizing Objects and Data Fields

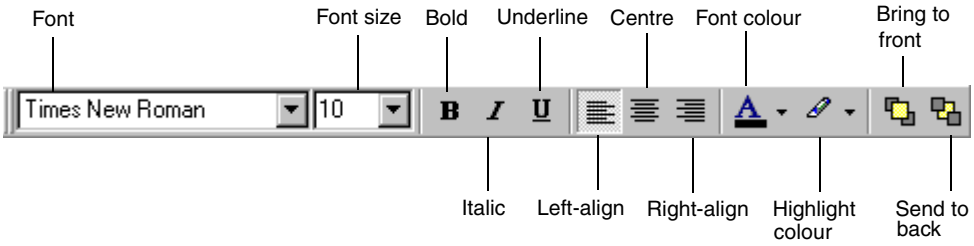
Take the following actions to position and size objects:

- To position the object or field, drag it to the desired location.
  - To view the exact position of an object on the card, right click and select Position.
  - To bring objects to the front of the layout, click the Bring to Front button or right click and select Bring to Front.
  - To send objects to the back of the layout, click the Send to Back button or right click and select Send to Back.
- To size the object:
  - Use the sizing handles or right-click and select AutoSize to size the field to the correct size for the label contents.

  Tip: *You can also do some extremely fine positioning with the Nudge toolbar, as described on "Fine Tuning the Size and Position of Objects" on page 592.*

Formatting Text Objects

Use the Format toolbar change any of the following text properties:

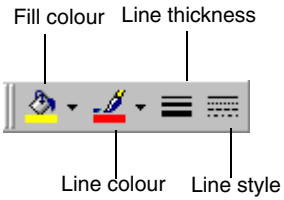


You can also edit other text properties by selecting from the popup menu.

1. Select an object, then right-click to display the popup menu.
2. Change properties such as wordwrap, transparency, or visibility of objects.

Formatting Graphic Objects

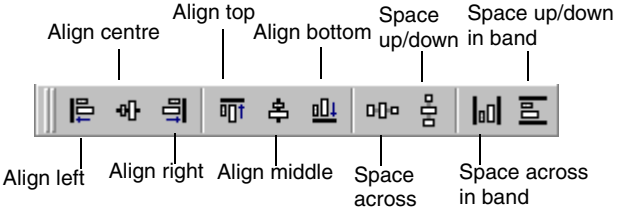
Use the Draw toolbar to add format lines and graphic shapes and add colour fills to them.



Aligning and Spacing Objects

The Screen Designer - Screen Print has its own toolbar for aligning and spacing objects; this is called the Align or Space toolbar. You can also set the grid to a specified number of millimeters and set objects to snap to the grid.

This gives you extremely powerful features to align all objects horizontally or vertically as you work.



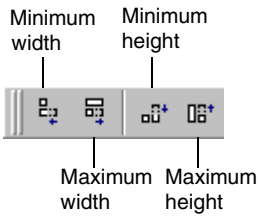
Using a Layout Grid

1. From the Design page, select Grid Options from the View menu.
2. Set the size of the grid in millimeters along the horizontal and vertical (X and Y) axes.
3. To have object snap to the grid, click the Snap to Grid checkbox.
4. Click OK.

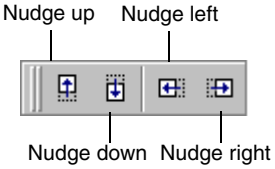
Fine Tuning the Size and Position of Objects

There are two toolbars you can use to control the size of objects and fine tune their positioning: the Size and Nudge toolbars.

Use the Size toolbar to instantly maximise or minimise the size, width or height of selected objects.



Use the Nudge toolbar to move selected objects up or down, left or right, a millimeter at a time.



Previewing the Design

You can preview your screen print to see if the design is working out as you intended.

Note: *If the preview is blank, there are no records to display.*

To preview a screen print design in progress:

- Click the Preview tab in Screen Designer - Screen Print.

  The screen print appears in the Preview window.

- To print the screen print, click the Print button on the toolbar, or select Print from the File menu.

To continue working on your design, click the Design tab.

SERVICE AND SUPPORT

Support Desk Business Hours

Telephone calls to the Vizual Business Tools Customer Support Desk are answered from 9:00am to 6:00pm, Monday to Friday (excluding Bank Holidays). Support enquiries sent via email and fax are handled throughout the day. We make every effort to respond to all email and fax enquiries within one business day.

Purchasing Support - Protecting Your Investment

All products purchased from Vizual Business Tools come with 30 days free access to our Customer Support Desk via telephone, fax and email. At the end of this period, free support is no longer available and an annual support fee must be paid for continued access to our Customer Support Services. Please contact your Alliance Partner or Vizual Business Tools direct on 020 8663 4500 for full details.

When you purchase an annual support contract, the following benefits are included:

- Access to the Customer Support Desk via telephone, fax, email, and our website
- Free upgrades to new and enhanced versions of the software
- Discounts on new product releases
- Weekly updates on HR news and legislation through our e-newsletter
- Free access to our 'Employer's Guide to HR' via www.vizual.co.uk/employers-guide.asp

The following services are not included:

- Site visits or call outs
- Extended user training by phone. For example, calls to the Customer Support Desk requesting step-by-step instructions for the creation of individually designed company reports, entire company absence allowance set ups, and screen modifications from scratch to completion. *In cases where the user requires this level of instruction we recommend the user refer to the User Manual prior to calling the Customer Support Desk or book a training day. For further details on Product Training, Consultancy, and Site Visit Requests please contact our Head Office on: 020 8663 4500*

Contacting Technical Support

When calling the Support Desk, please have the following information at hand:

- Name of the product you are using
- Product Version (To display from within the software, from the main screen, click the Help menu and select About)
- A brief description of the problem, including the exact text of any error messages received, and at what point they occurred
- The Windows platform you are using (Windows 95/98/2000/XP or NT)
- The specification of computer you are using (for example, Pentium 266, 64MB RAM)
- Details of the network on which the software is being used

Having these details ready will enable staff to assist you more quickly and efficiently.

***Please Note**: Calls to the Customer Support Desk may be monitored or recorded for training purposes.*

APPENDIX A

Understanding Pay Period Calculations

The following calculations are the formulas used to determine the calculated values displayed in yellow for Annual Pay, Pay Per Period and Hourly Rate on the Pay History screens.

Annual Pay Calculations

The following calculations are used to determine the Annual Pay.

Pay Basis	Formula
Per Annum	Annual Pay
Per Month	Monthly Pay x 12
Per Week	Weekly Pay x Company Weeks Per Year
Per Day	Daily Pay x Company Working Days Per Year
Per Hour	Hourly Rate x Contracted Hours Per Week x Company Weeks By Year
Per Shift	Pay Amount Per Shift x Shifts Per Year

Pay Per Period Calculations

The following calculations are used to determine the Pay Per Period. The formula used varies depending on the pay basis selected.

- If the pay basis is Per Annum.

Pay Period	Formula
Monthly	Annual Pay / 12
4 Weekly	Annual Pay/Company 4 Weeks per Year (Company Settings)
2 Weekly	Annual Pay/Company 2 Weeks per Year (Company Settings)
Weekly	Annual Pay/Company Weeks Per Year

- If the pay basis is Per Month

Pay Basis	Formula
Per Month	Monthly Pay
Per 4 Weekly	Monthly Pay x 48 / Company Weeks Per Year
Per 2 Weekly	Monthly Pay x 24 / Company Weeks Per Year
Per Weekly	Monthly Pay x 12 / Company Weeks Per Year

- If pay basis is Per Week

Pay Period	Formula
Monthly	Weekly Pay x Company Weeks Per Year / 12
4 Weekly	Weekly Pay x 4
2 Weekly	Weekly Pay x 2
Weekly	Weekly Pay

- If the pay basis is Per Hour:

Pay Period	Formula
Monthly	Hourly Rate x Contracted Hours Per Week x Company Weeks Per Year / 12
4 Weekly	Hourly Rate x Contracted Hours Per Week x 4
2 Weekly	Hourly Rate x Contracted Hours Per Week x 2
Weekly	Hourly Rate x Contracted Hours Per Week

- If the pay basis is Per Shift

Pay Basis	Formula
Shift Pay	Shift Pay

- If the pay basis is Per Day

Pay Period	Formula
Per Month	Pay Per Day x 5 x Company Weeks Per Year / 12
Per 4 Weekly	Pay Per Day x 20
Per 2 Weekly	Pay Per Day x 10
Per Week	Pay Per Day x 5

Hourly Rate Calculations

The following calculations are used to determine the Hourly Rate.

Pay Basis	Formula
Per Annum	(Annual Pay / Company Days Per Year) / (Contractual Hours Per Week / 5)
Per Month	(Monthly Pay x 12 / Company Weeks Per Year) / Contracted Hours Per Week
Per Week	Weekly Pay / Contracted Pay Per Week
Per Day	Pay Per Day / Hours Per Day
Per Shift	Shift Pay / Hours Per Shift
Per Hour	Pay Per Hour

APPENDIX B

Using Operators and Functions

When creating advanced queries, you use various operators and functions. Use the following rules and tables to create the search criteria you need.

Operator Precedence

The result of an expression depends on the order in which operations are performed. Each operator is assigned a precedence, and operations are performed in order of precedence. This eliminates possible ambiguities in expressions. An operation can be given higher precedence by surrounding it with parentheses.

Below is the operator precedence list from highest to lowest priority:

Operators	Precedence	Category
(,)	First	Prioritization
not, - , +	Second	Unary
^, **, *, /, mod, div	Third	Multiplicative
+, - , and , &, or, |, xor	Fourth	Additive
=, <>, <, <=, > , >=, like	Fifth	Relational
:=	Sixth	Assignment

The rules of precedence are:

1. An operand between two operators of different precedence is bound to the operator with higher precedence.
2. An operand between two equal operators is bound to the one on its left.
3. Expressions within parentheses are evaluated before being treated as a single operand.

Arithmetic Operators

Arithmetic operators manipulate numeric values. Most are binary operators, meaning they require two operands (variables or numbers). Unary operators require only one operand.

Binary Arithmetic Operators

Operator	Description
+	Addition
-	Subtraction
*	Multiplication
/	Division
div	Performs integer division on the operands
dmod	Performs modulo division
^, **	Exponentiation (raise a number to a power)
and, &	Performs a bitwise AND of the operands
or, |	Performs a bitwise OR of the operands
not	Performs a unary bitwise negation of an operand
<<, shl	Performs a left bit shift
>>, shr	Performs right bit-shift
xor	Performs a bitwise exclusive OR of the operands

Unary Arithmetic Operators

Operator	Description
+	Unary plus (sign identity)
-	Unary minus (sign negation)

Relational Operators

Expressions may contain the standard relational operators: Relational operators are used to check for a particular relationship between two values. The values being compared are usually of the same type or assignment compatible.

Operator	Description
<	Is Less Than
<-	Is Less Than Or Equal To
=	Is Equal To
<>	Is Not Equal To
>	Is Greater Than
>-	Is Greater Than Or Equal To
LIKE	String equality comparison with optional pattern matching

Logical Operators

The following operators work with integers and return an integer. Logical operators differ from the relational operators in that they work at the bit level as opposed to working with complete values.

All except the NOT operator are binary operators.

Operator	Description
NOT	Performs unary bitwise negation on its operand
AND	Bitwise and
OR	Bitwise or
SHL, <<	Bitwise shift left
SHR, >>	Bitwise shift right
XOR	Bitwise exclusive or

String Operators

String operators are used to perform operations on string operands.

Function	Description
+	Concatenation. Joins two strings together
-	Deletes the first occurrence of the second operand from the first
LIKE	Compares two strings with optional pattern matching

Boolean Operators

The boolean operators take boolean operands and return a boolean. All except NOT are binary operators.

Operator	Description
NOT	Negation
AND	Logical AND. Returns TRUE if both operands are TRUE
OR	Logical OR. Returns TRUE if either operand evaluates to TRUE
XOR	Logical exclusive or. Returns TRUE if one or the other, but not both operands are TRUE

Assignment Operators

Expressions may also have variable assignments of the form:

Variable AssignOp *Expression*

where AssignOp is one of the operators listed in the following table.

The assignment expression sets the value of the variable as well as returning the value of the expression.

Operator	Description
:=	Simple assignment
+=	Add numeric, date and time values or concatenate strings before assignment. A += B is equivalent to A := A + B
-=	Subtract numeric, date or time values before assignment. A -= B is equivalent to A := A - B
*=	Multiply numeric values before assignment. A*= B is equivalent to A := A * B
/=	Divide numeric values before assignment. A /= B is equivalent to A := A / B
**= , ^=	Raise numeric value to a power before assignment. A ^= B is equivalent to A := A^B
%=	Calculate modulus before assignment. A % B is equivalent to A := A % B
<<=	Left shift integer values before assignment. A <<= B is equivalent to A := A << B
>>=	Right shift integer value before assignment. A >> B is equivalent to A := A >> B

Statistical Functions

Statistical functions perform calculations on lists of numeric values.

Function	Description
AVG	Returns the arithmetic mean of a list of numbers
MAX	Returns the maximum value of a list of numbers
MIN	Returns the minimum value of a list of numbers

String Functions

The string functions manipulate character strings.

Function	Description
ASC	Returns the ASCII code for the first character in a string
CHR	Returns the character corresponding to an ASCII code.
CLEAN	Removes all unprintable characters from a string.
EXTRACT	Returns a specific delimited word from a string.
FIND	Locates text within a string.
FIRST	Returns a specified number of characters from the beginning of a string.
FORMAT	Returns a formatted series of arguments as a string.
INSERT	Inserts a substring into a string at a specific position.
LAST	Returns a specified number of characters from the end of a string.
LENGTH	Returns the length of a string.
LOWER	Converts text to lowercase.
LTRIM	Removes all instances of a specific leading character from a string.
MAXSTR	Returns the maximum value in a list of strings.
MINSTR	Returns the minimum value from a list of strings.
MID	Returns a substring of a string.
PADC	Centres a string within a given width.
PADL	Pads a string on the left with spaces to a specified length.
PADR	Pads a string on the right with spaces to a specified length.
PROPER	Capitalizes the first letter of every word in a string, and lowercases all other characters.

Function	Description
REPLACE	Replaces one substring with another.
REPLICATE	Duplicates a string a specific number of times.
RTRIM	Removes all instances of a specific trailing character from a string.
SOUNDEX	Returns the Soundex code for a string.
SOUNDALIKE	Determines if two strings sound alike, based on their Soundex codes.
STR	Returns the string equivalent of a value.
TRIM	Removes a specific leading and trailing character from a string.
UPPER	Converts a string to uppercase.
VAL	Converts a string to its numeric equivalent.
WORDCOUNT	Returns the number of words in a string.

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